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THE POSITION OF ORIENTAL TOBACCO IN WORLD PRODUCTION AND TRADE

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The Position of Oriental Tobacco in World Production and Trade

By James W. Birkhead and Albert B. Davis
Tobacco Division

Summary

Oriental accounts for about one-eighth of the world's production of all kinds of tobacco, but it makes up over one-fourth of total world exports of unmanufactured tobacco since half of all the oriental produced enters international trade.

Production and exports of oriental leaf have risen sharply in recent years and are expected to continue to rise in the years immediately ahead. About a billion pounds of oriental and semioriental leaf is now produced annually, as against 725 million pounds in 1950. Exports, which were about the same in 1947-51 as they had been in 1935-39 (280 million pounds), reached 375 million pounds in 1956 and a new high of 460 million in 1957.

Competition for markets is increasing, too. It will be even keener this year than it was last year, for there is well over 500 million pounds of fermented oriental and semioriental leaf available for export in 1958-59, and the governments of the exporting countries (mainly Turkey, Greece, Bulgaria, and Yugoslavia) are taking strong measures to assure maximum exports. In all these countries, there is widespread government participation in encouraging both production and export of tobacco. Bilateral government trade agreements are used widely to help move oriental tobacco into the world markets.

One of the major advantages that oriental-exporting countries have is that they need industrial goods, and most of the important tobacco importing countries are exporters of such goods.

This situation has been a strong stimulant to the expansion of production and exports of oriental tobacco.

Oriental is highly competitive with U.S. cigarette leaf, especially flue-cured, in Western Germany, Austria, Belgium, Finland, Switzerland, Italy, France, and Egypt.

Introduction

Oriental was the first type of tobacco used in cigarettes. About half of world production of oriental enters international trade and this kind of leaf is very competitive with other cigarette tobaccos, particularly where a mild smoke is desired. Most of the oriental types are known as aromatic tobaccos because of their pronounced aromas. Some types and grades are neutral and certain types have pronounced flavors, but aroma and mild flavor are the characteristics

that have contributed most to the expansion in use of oriental tobaccos.

Oriental leaf is used largely in cigarettes, alone or in blends--in the American blends, and in the so-called American-type blends produced abroad, and in straight Virginia (flue-cured) cigarettes. It is used in blended and straight Virginia cigarettes primarily for the aroma and, in some cases as a filler, but not for the flavor as is commonly thought. In straight Virginia types of cigarettes a small percentage of neutral oriental is used primarily as a filler and to a lessor extent to give additional aroma. The straight oriental cigarette is still popular in Eastern Europe and the Middle East.

Cigarettes were developed more or less by accident, as a result of a shortage of pipes and cigars during the Crimean War (1854-55). Their use was readily adopted because they were convenient and they supplied something new to occupy the soldiers during the hours between battles. Cigarette smoking developed in an oriental-leaf-producing area, so it was natural that the soldiers acquired a taste for this kind of tobacco. The habit was brought to Europe by the returning soldiers of the allied armies. Oriental leaf, thereby, gained a long lead over other kinds of tobacco for use in the manufacture of cigarettes. This lead continued for many years.

It was not until World War I when oriental leaf was relatively unobtainable that oriental got a substantial rival. The millions of American troops pouring into Europe brought new blends of cigarettes made mostly of American tobaccos. This war gave great impetus to cigarette smoking, a most convenient form of tobacco use. After the beginning of World War I, the numerous new advocates of the cigarette smoking habit in many countries of Western Europe acquired a taste for American tobacco.

The central part of Europe not occupied by Allied troops in World War I did not shift away from oriental cigarettes right after that war. But by World War II, long occupation of certain of these areas by allied troops and the influx of western tourists had brought about a sharp increase in demand for the American blend type of cigarette.

In the immediate postwar (World War II) period the use of oriental tobacco lost ground in several areas, particularly in Europe, but in the last few years it has made a recovery in some of these markets. This recovery has been based primarily on trade considerations and increased demand for oriental for use in blended cigarettes rather than a rise in demand for the straight oriental types. Oriental-producing nations are important markets for the manufactured goods of the industrial nations of Europe which import leaf tobacco, and this has been an important factor contributing to increased sales of oriental leaf.

Role of Oriental and Its Producers

Oriental and semioriental tobaccos are a very important part of the international trade in leaf tobacco. It is the only kind of tobacco which continues to hold its own against the increasing world trade in flue-cured leaf. For the past 20 years oriental and semioriental have accounted for approximately 10 percent of total world production of tobacco. Total world exports of all types of tobacco in 1956 and 1957 were about 1.6 billion pounds and about 400 million pounds,

or 25 percent of the total, was oriental leaf. Approximately one-half of the tobacco grown in Russia and Eastern Europe is oriental leaf. Turkey, Greece, and Bulgaria produce mostly this type.

All countries exporting significant amounts of oriental are extremely dependent upon the income and foreign exchange earnings from tobacco exports. This is particularly true of Greece, Turkey, and Bulgaria, the countries which supply the great bulk of oriental.

Tobacco supplies 37 percent of the foreign currency earnings of Greece and 30 percent for Turkey. In the 1950-57 period 83 percent of Greek production, 72 percent of Turkish, 70 percent of Bulgarian, and 46 percent of Yugoslavian production was exported.

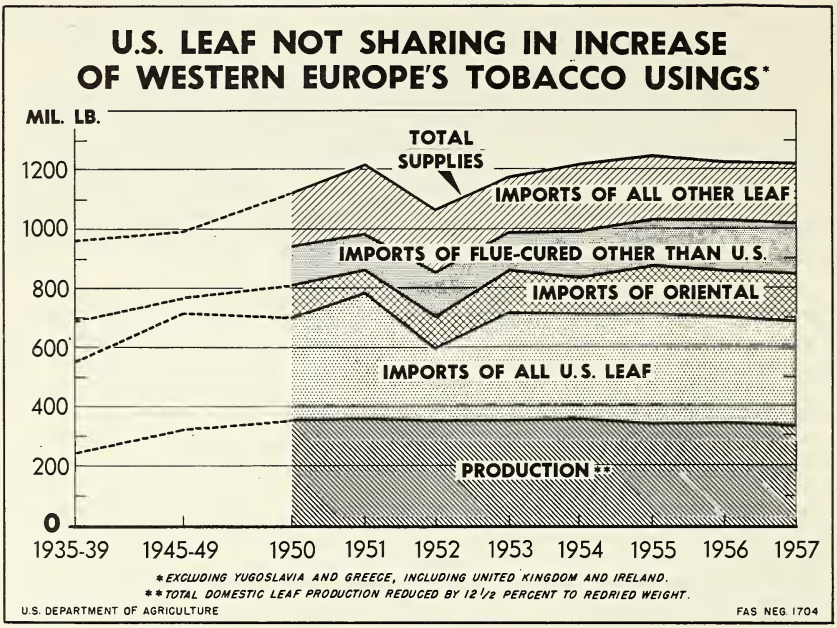
The production of this kind of tobacco, which is centered in the Mediterranean-Black Sea area, has continued to flourish there because of an ample supply of inexpensive labor, suitable climate, adapted soils, and established export outlets for increasing supplies. One of the main objectives in this area is to secure the largest income and foreign exchange earnings per acre of the scarce land available. The best way to accomplish this is to produce oriental tobacco. Tillable land is scarce and labor is plentiful. As many as 2,000 to 3,000 hours of human labor are used to produce an acre of oriental tobacco. Yields are low, seldom over 650 pounds per acre and usually below 600 pounds. Even if the farmer receives an average of 40 cents per pound for his tobacco, which is more than most farmers do receive, the gross return per hour would be approximately 8 to 13 cents per hour of human labor used in producing the crop.

In most tobacco growing countries, total output is usually limited directly or indirectly to the amount of leaf needed to fill fairly certain market commitments. In Turkey, Greece, and Bulgaria, production frequently exceeds the assured market for the leaf and the marketing of surplus tobacco often becomes a government problem. Chiefly because of this, most exports move under state bilateral arrangements. Tobacco can be stored for long periods and industrial countries eventually take the surpluses partly to maintain the sales of export items to the oriental producing countries.

Competitive Position of Oriental

The keenest competition which oriental tobaccos furnish is to other light cigarette types of leaf. While there is competition between oriental and several other types of leaf, the sharpest battle for foreign markets is between oriental and flue-cured. This is true in regard to competition between kinds of cigarettes (the blended or straight Virginia types in relation to the straight oriental type) as well as in relation to the proportions of the mixtures of the various kinds of tobaccos used in both the American type blends and the straight Virginia types.

Oriental offers the greatest competition to U.S. exports in the markets of Western Europe, particularly West Germany, Austria, Belgium, Finland, Switzerland, Italy, and France. The most pronounced changes in recent years have been in Germany, Austria, and perhaps currently Finland. This has been mainly a trend of shifting away from the straight oriental type cigarettes toward the American blended type. Immediately after World War II, West Germany did not have the means to pay for imported leaf. Buying arrangements with the United States contributed to their shifting



almost entirely to American-type cigarettes from the prewar pattern of practically all being straight oriental types. While total imports of U.S. leaf by West Germany continue to rise, there has been a trend in the past few years of increasing the proportion of total consumption that is oriental and non-U.S. flue-cured and decreasing the proportion of U.S. and domestic leaf. The modified American blends in West Germany now contain about 50 percent oriental.

When comparing 1957 with the 1950-54 average, total tobacco imports of leaf from the United States by West Europe increased 14 million pounds, or 3.8 percent, imports of non-U.S. flue-cured rose 45 million pounds, or 22 percent, imports of non-U.S. Burley rose from 2.0 million pounds to 12.3 million pounds, or over 500 percent.

Imports of oriental and semioriental increased about 48 million pounds, or 42 percent, while there was practically no change in the level of total imports of other tobaccos. This indicates that from the standpoint of competition with U.S. tobacco in recent years the rising sales of oriental tobacco in Western Europe have been about as important as the increasing imports of non-U.S. flue-cured.

There are three new important factors which contribute to maintaining or increasing the use of oriental in Western Europe. They are (1) more cigarettes are being smoked (2) European grades (middle quality) of oriental are somewhat lower priced that the better qualities of U.S., Canadian, and Rhodesian cigarette leaf, and (3) many of the tobacco importing countries will buy oriental in order to increase their exports, particularly of manufactured products, to the oriental producing areas. In many, if not most cases, oriental tobaccos cost more than the medium and lower qualities

TABLE 1.--Oriental and semioriental tobaccos: Estimated exports, by country of destination, average 1935-39 and 1947-51, annual 1954-57

Country	Average		1954	1955	1956	1957[1]
	1935-39	1947-51				
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Turkey.....	75.5	123.8	142.0	132.3	129.5	195.0
Greece.....	97.7	53.2	115.6	120.9	110.5	149.0
Bulgaria....	54.2	57.8	49.2	60.2	([2])	([2])
Yugoslavia[3].	10.4	22.0	15.0	32.0	41.0	35.4
Italy.....	10.0	8.0	14.4	6.0	9.0	4.2
Iran.....	.5	3.6	.8	2.6	.3	([2])
Syria.....	2.8	6.5	3.0	2.0	1.0	([2])
Lebanon.....	([4])	([4])	.9	.7	([2])	([2])
Federation.. of Rhodesia and Nyasa-land.....	[5].8	2.3	.2	.3	.4	([2])
Cyprus.....	([2])	.3	.4	.2	.1	([2])
Others[6].....	30.8	2.9	16.4	14.8	([2])	([2])
Total[7]...	282.7	280.4	357.9	372.0	375.0	460.0

[1]Preliminary. [2]Not available. [3]Mostly oriental and semioriental. [4]Included in Syrian exports. [5]Exports from Southern Rhodesia in 1938-39 only. [6]Includes Hungary, Rumania, and U.S.S.R. [7]This estimate includes those not separately listed in 1956 and 1957.

of flue-cured. This is especially true of most of the flue-cured from India, China mainland, and the Federation of Rhodesia and Nyasaland, as well as some grades from the United States and certain other areas. Prospects are that this competition between the cigarette types in world markets is likely to continue and probably intensify in the period immediately ahead. If current price relationships continue or if prices of oriental rise more than the cost of other cigarette types, use may shift to the lower priced qualities of other cigarette types at the expense of oriental, especially in Western Europe.

Oriental tobacco has a very small leaf and yields per acre are low, so large amounts of hand labor are required to harvest and manipulate a pound of this kind of tobacco. The oriental producing countries are expanding industrially and increasing wage rates. These rising rates will raise oriental production costs and make the growing of oriental tobacco less attractive unless the relative prices for oriental rise, or the production can be mechanized. Currently there appears little prospect for the latter. Because of these factors and the shift in certain areas, especially of Western Europe toward the American-type blend in cigarettes, there may be a leveling off in competition from oriental leaf.

With the sharply expanding production of oriental in the past 2 or 3 years the exporting countries are finding it increasingly

difficult to dispose of stocks. This situation is likely to worsen in the years immediately ahead unless the rate of expansion in production is brought into line with prospective demand.

Turkey's sales increased sharply in 1957, and Greece's exports reached an alltime high in 1957. Bulgaria, with sharply reduced sales in the immediate postwar period, has almost doubled its exports in the past 3 or 4 years.

Yugoslavian production and exports of oriental and semioriental (mostly semioriental) have risen sharply since World War II. Yugoslav exports established an alltime high in 1956, but dropped in 1957 because of the poor crop in 1956. Exports, which averaged approximately 10 million pounds before the war, were more than double that figure in the 1946-57 period. The sharply increased production in 1957 is expected to result in export availabilities of 70 million to 75 million pounds.

Italy's level of exports--mostly semioriental--has declined since 1954. Syria, Cyprus, Lebanon, Iran, the Federation of Rhodesia and Nyasaland, and Rumania all ship small quantities. Exports from both Syria and Iran have been decreasing in recent years. A large part of the decline in exports of Latakia (fire-cured oriental) from Syria has been caused by the decrease in U.S. demand for this type of leaf.

Turkey

Summary

Turkey is the seventh largest producer and second largest exporter of tobacco. Production has risen sharply in recent years. Turkey produced an alltime high of 260 million pounds of tobacco in 1957 compared with an average of 191 million pounds in the 1945-49 period and 129 million pounds prewar (1935-39). Production can be expanded further but any great increase means the use of additional lowland soils which do not produce the high quality aromatic tobaccos that are grown on the hillsides. Most of the postwar stimulus to the expansion in leaf production has been caused by increasing export demand. Two-thirds to 75 percent of total production is exported. Manipulated leaf used in the domestic manufacture of products rose sharply from about 49 million pounds in 1952 to 60 million in 1955, 75 million in 1956, and is estimated at about 80 million in 1957.

Production by Types

There are about nine distinctly different kinds or groups of closely related types of leaf grown in various areas of Turkey. About seven of these groups appear to be distinctly different genetically and within each of the three major groups of truly aromatic types there are several sub-types or strains that differ primarily because of characteristics associated with the soils, elevation, and climates of the areas in which they are grown.

The bulk of production is nicotiana tabacum with two main hybrid types--Havanensis X Brasiliensis grown mainly in the Aegean area of western Turkey, and Havanensis X Atropurpuies grown largely in the Black Sea Region of northwestern Turkey. These oriental

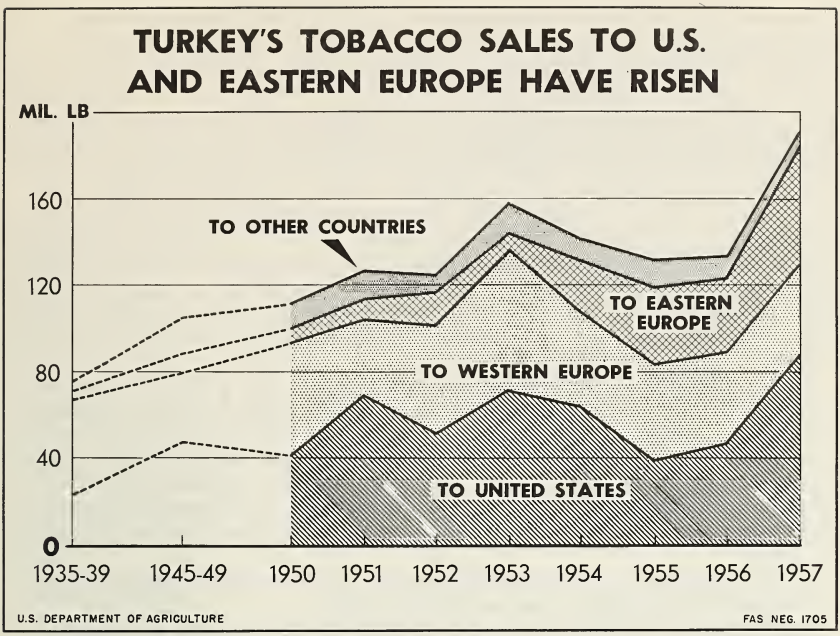


TABLE 2.--Turkey: Production and exports of tobacco, average 1935-39 and 1945-49, annual 1950-57

Year	Production		Exports
	Unfermented[1]	Fermented	
Average:	Million pounds	Million pounds	Million pounds
1935-39	129	113	75
1945-49	191	167	105
Annual:			
1950	206	180	112
1951	195	171	127
1952	200	175	125
1953	259	227	158
1954	215	188	142
1955	251	220	132
1956	253	221	134
1957[2]	260	228	191

[1]Farm sales weight. [2]Preliminary.

types are discussed in detail below. About 4 million pounds of Nicotiana Persica are grown in and around the Malatya area of eastern Turkey. Both the dark and light types are grown in the eastern provinces, but the light types predominate. A small amount (less than 1 million pounds) of a nicotiana rustica type, known as Hasankayf is grown at high elevations in the Ayutab area of Gaziantep Province in the southern part of Turkey near the Syrian border. From 450,000 to 800,000 pounds were produced annually in the 1952-55 period, much of which has been exported to Egypt, but demand for this type has been declining. From 800,000 to 1 million pounds of flue-cured varieties, mostly in the Bacak district (Antalya area) were produced annually in the 1953-55 period. One to one-and-one-half million pounds of Tombeki (Tombac) have been grown in the Antakya, Iskenderum (Hatay area) and Hadim district (Konya area) of southern and eastern Turkey.

About 200,000 to 300,000 pounds of puro (cigar leaf) are produced in the Pazar district (Trabzon area of Black Sea region). Much of the tobacco grown in the Trabzon district is known as the Trabzon-type, which is distinctly different from the true, small-leaf oriental types. It has fairly large light red leaves of fine texture which are similar to semioriental and certain light air-cured types grown in other countries. It is very strong and much of this type is exported to Egypt.

Tombeki (Tombac) is used domestically mostly in waterpipes, particularly in eastern and southern Turkey.

Hasankayf is a high nicotine type largely for export to Egypt where it is used in waterpipes.

Puro is used primarily in cigars.

Flue-cured has been used domestically almost entirely in one of the more expensive brands of cigarettes.

The oriental subtypes are discussed in considerable detail by producing regions below.

I. Aegean Sea Region

Smyrna Aromatics: These are aromatic tobaccos which are almost neutral in regard to flavor or taste. Because of the differences in characteristics, they may be divided into four broad classes or groups:

Group 1 - Gavurkoys are highly aromatic and fine in texture although the leaves are heavier than from most areas as their growth is influenced by the favorable moist south winds.

Sevindikeuy and Botch tobaccos are considered next to the Gavurkoys in quality because of their aroma, fine texture, and color. Ayassoulouk and Scalanova produce similar tobaccos which are less desired by the export trade. Torbali is sweet but relatively flavorless. Vourla and Tchesme lack aroma and lose color rapidly in storage. Milos, Mugla, and Feshie are considered to be somewhat hard, but fairly sweet.

Group 2 - (sometimes called Basma after original method of packing.) These are grown in the Odemish, Lygda, and Thyra districts and are considered neutral.

Group 3 - These are produced in and around the villages of Papazli-Tchoban, Issa, Kara-Oghlu, as well as in the Manisa and Akhisar districts. These are sweet tobaccos that are considered slightly hard and lose quality fairly rapidly in storage. Quality is

reported to have been improved in recent years and these are in export demand largely because of their sweet taste. Similar types which give fairly high yields are grown in Cassaba, Baindir and other areas.

Group 4 - This group, which is generally known as "Yerlis" tobacco, is grown in the Bergama and Denizli districts and is considered inferior in quality.

II. Marmara Sea and Thrace

As a whole, the Marmara region tobaccos are reddish with little aroma, mostly filler types. There are at least six different areas in the Marmara Sea and Thrace regions which produce leaf that has distinctly different characteristics. They are: Duzdje, Izmit, Hendek, Bursa, Gonen, and Thrace.

Duzdje tobaccos have small red leaves of fine texture, burn well and have a pronounced characteristic aroma. They are often a substitute for the Bafra type grown in the Black Sea region.

Izmit leaf is about the same size, shape and color as Duzdje, but is milder in taste and more nearly neutral in regard to aroma.

Hendek tobacco has larger leaves and is somewhat coarser than Duzdje and Ismit. It is neutral in taste and is used principally as a filler.

Bursa leaf is medium in size, neutral in taste and mild to medium in aroma.

Gonen leaf is a neutral filler.

Thrace tobacco is light yellow to greenish yellow and is relatively strong, mostly for domestic use with exports going mainly to Egypt.

III. Black Sea Region

Tobaccos grown near the Black Sea are well known aromatic cigarette types that are in great demand by U.S. manufacturers. They are liked because of their pleasant aroma, light color, fine texture and good combustibility. In the Black Sea region there are several distinct types, but Samsun, Bafra, Tashova, Basma and Trabzon account for the bulk of production. Of the main types, Samsun and Bafra are most important in the export trade. The distinct characteristics, particularly the aroma of Samsun, are due chiefly to the volcanic type of soil and influence of winds from the sea in the Samsun area where it is grown. Samsun is highly aromatic with the better qualities in heavy demand by the export trade. The major subgroups of Samsun differ largely because of the differences in soils and elevation. These groups of Samsun-types in order of quality are Maden, Dere, Djanik (Canik), Evkaf, and Tcharshamba. The soils originated from volcanic rock and are dark brown to black loams with some sand. Bafra, which is also grown in the Black Sea region is closely related to Samsun as it was developed from Samsun seed. The leaf has the appearance of the Evkaf (Samsun) subtype, but is stronger. Some Bafra is exported, but much of this type is used in domestic production of cigarettes.

Like the Aegean Sea region, the Black Sea region is divided into separate districts or zones of cultivation which produce leaf with

distinctly different characteristics. The five main zones of the Black Sea region are:

District 1. (Samsun). Maden: Maden has a small leaf (3.0 to 3.5 inches by 1.5 to 2.0 inches) light of color, very fine texture. It is known as one of the best aromatic tobaccos. It is unique in flavor and taste, which is mild and agreeable, burns readily and has a very pleasant aroma. Maden tobacco is used in the preparation of high quality cigarettes.

Dere: Dere has a leaf of 3.5 to 4.0 inches by 1.75 to 2.0 inches and possesses nearly all the characteristics of Maden but is somewhat darker in color and sweeter in taste.

Djanik (Canik): Djanik is larger (4.0 to 6.0 inches by 1.25 to 1.75 inches) stronger than Maden but otherwise possesses the other qualities of Maden. Tobacco grown in Sitmasuyu is well known for its characteristic aroma.

Evkaf: The leaves of the Evkaf tobacco are larger (4.0 to 4.5 by 1.5 inches to 2.0 inches), thicker, darker in color, stronger in taste and do not burn as well as Maden, Dere and Djanik.

Tcharshamba: It resembles Djanik tobacco in appearance, but is inferior in quality.

District 2. (Bafra). Bafra: It is used principally for flavor and aroma in blends. This tobacco has small leaves (4 to 4.5 inches by 1.5 to 2.0 inches) that is light red or darker brown and is comparatively heavier and coarser in texture than Samsun and has a stronger flavor.

Alacham, Sinop, Gerze: Tobaccos grown in these areas are very similar to Bafra, but are stronger, do not possess the delicacy nor the taste of Bafra, and lose their color more readily in storage or when cut.

District 3. (Tashova). This leaf, which has a leaf 4 to 4.5 inches by 1.5 to 2.0 inches, is grown chiefly in the Tashova and Erbaa areas of Tokat Province. It is mainly a cigarette filler, somewhat neutral, but is sweet and blends well with other tobaccos without altering the flavor and aroma of these other tobaccos. The leaf is somewhat larger than those of Samsun and Bafra.

District 4. (Basma). The Gümüs-Haei-Köy tobacco differs from all other tobaccos grown in Turkey. Basma is a small leaf (2.0 to 2.5 inches by 1.0 inch) that is known in this area as "Greek tail-less," and is one of the most aromatic Turkish tobaccos. It does not have the usual type of stem or extension of the midrib, and has the same characteristics as the Basma types of northeastern Greece, where the seeds used in Turkey originate. Basma is produced in the Gümüs, Haei and Köy areas of Amasya Province. Basma has fine, light red leaves, is mild and aromatic. Purchases of this type by the Turkish Monopoly are for use in the manufacture of high grade cigarettes.

District 5. (Trabzon). The Trabzon (sometimes called Polathane) type has a larger leaf than the types normally considered to be truly oriental or aromatic tobaccos and is more like the semi-oriental or light air-cured types grown in some Balkan countries. The leaf is 5.5 to 10.0 inches long and 3.0 to 6.0 inches wide. The leaves are light red in color and of fine texture. Part of this type is irrigated, the plants are topped low and the resulting leaf is very strong being used almost entirely for domestic consumption with some exports, mainly to Egypt.

System of Buying and Selling

There is no public auction system. The Turkish Tobacco Monopoly buys the leaf to be used for domestic manufacture directly from the farmer. Manufacturing is also done by the Turkish Tobacco Monopoly. When prices weaken the Monopoly purchases additional leaf in an effort to support the price to farmers. The Monopoly exports unmanufactured tobacco mainly to those countries which have state trading organizations and which have bilateral agreements with Turkey. Tobacco merchants or foreign representatives buy from the farmer by direct negotiations usually at the farmers barn. Some leaf is exported as purchased without further processing, but most of the leaf is manipulated (sorted, graded, and baled) and stored in Turkey for several months where it undergoes at least one fermentation. Practically all of the leaf bought by the United States and United Kingdom is manipulated and stored in warehouses in Turkey, but these warehouses are owned and operated by companies in the importing countries. Other importers purchase most of their requirements from tobacco merchants. In such cases the leaf is usually manipulated by agents of the foreign buyer.

Government Participation

Tobacco production is regulated by the Turkish Monopoly (Tekel). A farmer who wishes to grow tobacco must apply in writing to the Monopoly Director in his province. The farm is then inspected by a committee, which determines the advisability of growing tobacco on the particular farm. During the production season, personnel from the Monopoly visit the fields from time to time and estimate the expected quantity and quality of tobacco. Each farmer must provide the Monopoly with sales records of all tobacco sold. Any material disagreement between quantity estimated and quantity sold requires an explanation. The objectives of these regulations are to ensure that tobacco will be grown on the most suitable land and to prevent any black market sale of tobacco. No attempt is made to limit production. Much of the credit to tobacco growers is issued through government or quasi-governmental organizations. The Monopoly buys from the farmer all the leaf used domestically, owns and operates all the tobacco manufacturing facilities, and distributes all the tobacco products through designated retail stores. It also purchases leaf to support prices to farmers although there are no minimum price guarantees.

The Monopoly is responsible for the control of exports (through export permits), but this function has been delegated to another government agency. In the past few years a "bonus" has been paid to tobacco farmers in an effort to offset rising production costs and keep export prices from rising too sharply. The government and Turkish tobacco merchants promote the sale of tobacco abroad and have a continuing policy and program of moving tobacco into international trade through the use of bilateral agreements.

Export Trade Arrangements

A large part of Turkey's tobacco exports move under bilateral arrangements. In 1956 Turkey had bilateral agreements with 23

countries to which about 50 percent of total tobacco shipments were sent. Excluding shipments to the United States, about 70 percent of all Turkish exports are shipped under these bilateral agreements. The price of all export sales must be approved by an agency acting for the government, and export permits must be issued before exports can be made. In the case of certain commodities, where reexport to a third country may occur, the Turkish Government requires a certificate from the purchasing country within a specified time showing that the commodity actually entered the country making the purchase, and that customs were paid if subject to a customs duty.

The most important change since World War II is the increased shipments to the United States and Western Europe and the large increase since 1953 in takings by the Soviet Bloc, particularly East Germany. It is interesting that the Communist countries have been paying very high prices for Turkish tobaccos.

Trade agreements with clearing agreement countries are essentially barter in nature. Each country has the problem of bargaining for price and also for commodities to be bought or sold. The result of such bargaining, especially by the Soviet Bloc countries, is that prices of commodities sold to the Turks are overpriced in relation to world market prices which makes it possible for such countries to offer prices for Turkish tobacco that are well above prices paid by other buyers.

Exports

Tobacco exports are the largest foreign exchange earner of any agricultural product of Turkey. Exports in the 1950-57 period have been about 35 percent above the 1945-49 average and about double the prewar (1935-39) level. After reaching a high in 1953, exports fell below that level for a number of years and then rose sharply to a new record in 1957. Exports in the 1950-57 period accounted for 72 percent of total production.

The United States is by far the largest importer of Turkish leaf and has accounted for nearly half of total Turkish tobacco exports in the 1950-57 period. Exports to the United States have averaged over 50 million pounds annually in the past eight year period (1950-57) which is approximately two and one-half times the prewar (1935-39) level. Shipments to the United States were very high in 1953, declined in 1954 and decreased further in 1955, but rose in 1956 and again to an alltime high in 1957. United States imports from Turkey are expected to decrease significantly in 1958 from the abnormally high level of 1957.

Germany is the second largest importer of Turkish leaf. The Federal Republic took a little less than Eastern Germany in 1957. The total taken by Germany in 1957 was, for the first time, well above the prewar average.

Excluding Germany, the total exports to Western Europe in 1957 were almost double the prewar average (1935-39). Exports to Belgium, Denmark, Netherlands, Sweden, and Norway have recently been well below prewar levels. In the past 3 or 4 years sales to France, Italy, Austria, the United Kingdom, and Switzerland have been above prewar. Exports have declined from 1945-53 levels to all countries of Western Europe, except West Germany, France, and Italy which have increased their purchases. Austria imported

TABLE 3.--Turkey: Exports of leaf tobacco, by country of destination, 1950-57

Country of destination	1950	1951	1952	1953	1954	1955	1956	1957
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	40.9	69.7	51.7	72.1	64.9	38.7	47.2	88.0
United Kingdom	13.0	3.0	3.7	10.3	10.8	7.5	4.3	2.8
Belgium	4.5	3.8	5.5	5.5	3.0	2.0	1.6	1.1
Denmark	2.0	.4	.3	.3	.4	.3	.4	.3
France	3.2	6.7	2.3	4.4	5.0	4.7	5.1	6.1
Finland	1.4	2.4	2.5	3.3	2.4	1.7	3.1	1.3
Italy	1.8	1.7	3.2	6.8	1.5	7.4	5.1	6.5
Netherlands	1.9	.3	1.2	1.3	.5	.6	.2	.4
Norway	1.0	.2	1.1	.9	.2	.9	.6	.4
Spain	--	--	1.1	1.9	--	1.5	--	.3
Sweden	2.0	1.1	1.8	1.6	1.8	.6	1.1	.7
Switzerland	2.5	1.6	2.8	3.0	2.9	2.5	3.2	1.9
West Germany	13.4	9.7	20.8	21.0	12.0	11.9	14.1	17.2
Austria	6.7	3.6	4.1	3.5	2.1	3.0	3.4	3.4
East Germany	--	--	3.1	2.3	12.2	10.1	14.0	21.8
Yugoslavia	--	2.5	--	--	--	3.2	--	3.3
Czechoslovakia	4.7	2.9	.6	3.5	4.1	5.5	9.2	11.7
Hungary	--	.5	5.7	2.2	2.4	3.4	2.1	2.2
Poland	1.4	(1)	.2	--	4.8	13.2	8.6	11.5
U.S.S.R.	--	3.7	5.8	--	1.1	--	.6	2.3
Other	11.6	13.2	7.5	14.1	9.9	13.3	10.1	7.8
Total	112.0	127.0	125.0	158.0	142.0	132.0	134.0	191.0

[1] Only 44,000 pounds.

TABLE 4.--Turkey: Average export prices of leaf tobacco shipped to selected countries, 1950-57[1]

Country	1950	1951	1952	1953	1954	1955	1956	1957
	U.S. cents per pound	U.S. cents per pound	U.S. cents per pound	U.S. cents per pound	U.S. cents per pound	U.S. cents per pound	U.S. cents per pound	U.S. cents per pound
United States.	58	59	60	62	65	70	70	69
West Germany..	55	49	50	49	62	66	68	73
East Germany..	--	--	32	46	58	72	80	78
United Kingdom	59	50	55	59	67	74	59	64
Austria.....	62	49	50	46	66	57	68	57
Belgium.....	26	26	25	23	27	36	50	32
Denmark.....	68	70	72	57	66	51	84	61
France.....	29	33	38	37	37	60	63	64
Finland.....	62	67	65	58	63	66	73	73
Italy.....	67	76	37	39	80	74	60	71
Netherlands...	43	19	23	29	32	49	52	45
Norway.....	46	39	41	41	64	61	57	66
Spain.....	(2)	(2)	29	24	(2)	70	(2)	100
Sweden.....	61	70	77	80	111	70	90	79
Switzerland...	46	45	50	50	54	66	66	62
Yugoslavia....	(2)	9	(2)	(2)	(2)	63	(2)	55
Czechoslovakia	68	64	54	67	69	82	90	96
Hungary.....	(2)	(2)	20	27	27	40	72	70
Poland.....	56	111	89	(2)	64	75	80	86
U.S.S.R.....	(2)	6	30	(2)	66	(2)	88	80
Average.....	56	56	50	55	61	69	72	72

[1]Converted directly from Turkish lira to U.S. cents on the basis of the official exchange rate. [2]Not available.

TABLE 5.--Turkey: Exports of leaf to selected areas, average 1935-39 and 1945-49, annual 1950-57

Area	Average		1950	1951	1952	1953	1954	1955	1956	1957
	1935-39	1945-49								
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States.....	23	47	41	70	52	72	64	39	47	88
Western Europe[1].....	36	32	53	34	50	64	43	45	42	42
Eastern Europe[2].....	13	9	6	10	15	8	25	35	35	54
Other[3].....	4	17	12	13	8	14	10	13	10	7
Total.....	76	105	112	127	125	158	142	132	134	191

[1]Includes United Kingdom, Belgium, Denmark, France, Finland, Italy, Netherlands, Norway, Spain, Sweden, Switzerland, Austria, and West Germany. For 1935-39, 8 million pounds of the 30.9 million was deducted from Germany and added to Eastern Europe in order to make it comparable with later data. [2]Includes Eastern Zone of Germany, Yugoslavia, Czechoslovakia, Hungary, Poland, Bulgaria, and the Soviet Union. [3]Includes exports to Egypt and smaller amounts to other countries, usually less than a million pounds. Egypt took 2 million to 9.5 million pounds annually in 1950-57.

an average of 1.7 million pounds in the 1935-39 period, averaged 800,000 in 1945-49, jumped to 6.7 million in 1950, and has averaged about 3 million pounds per year since that time.

Excluding the United States and Germany, the largest importers in 1957 were Czechoslovakia, Poland, Italy, and France.

Also excluding the United States and Germany, the largest recent rise in exports has been to the Communist nations of Eastern Europe. Shipments to this group have risen 10 million to 15 million pounds annually since 1953 to the very high level of 54 million pounds in 1957. The largest importers in this group in 1957 were the Eastern Zone of Germany, Czechoslovakia, and Poland. Even Yugoslavia and Bulgaria, both exporters of oriental leaf, are importing Turkish tobacco but some of this is probably re-exported.

During the past few years the Communist countries of Eastern Europe have imported larger quantities of Turkish leaf partly because they are short of supplies, but in a number of cases mainly for political and propaganda purposes.

Domestic Consumption

Total industrial production of tobacco products in Turkey has shown steady gains in recent years with an unusual increase in 1956.

TABLE 6.--Turkey: Tobacco used in production of manufactured products, 1952-56

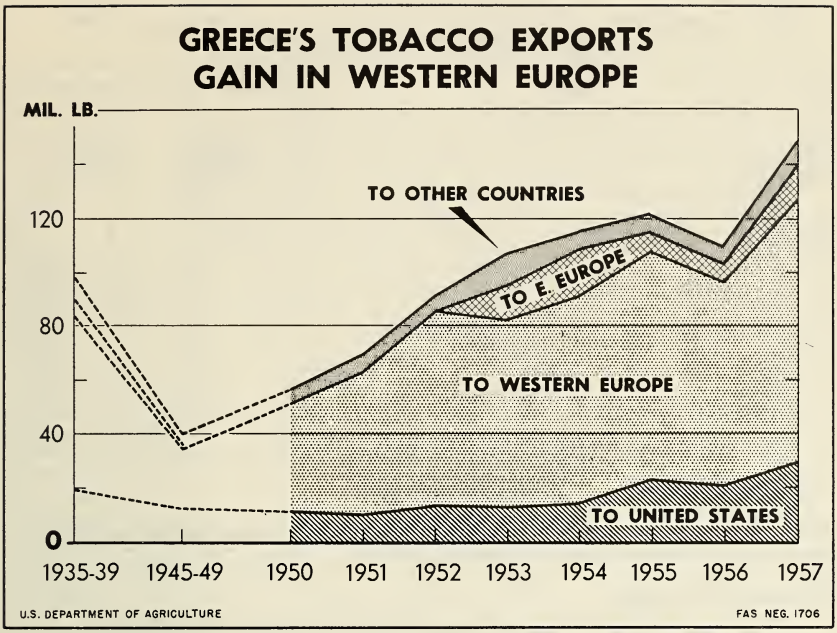
Year	Cigarettes	Cut tobacco	Snuff, cigars, chewing	Total
	Million pounds	Million pounds	Million pounds	Million pounds
1952.....	41.5	6.6	0.5	48.6
1953.....	45.3	5.8	.2	51.3
1954.....	52.3	7.0	.2	59.5
1955.....	52.9	6.4	.2	59.5
1956.....	68.3	6.6	.2	75.1

Greece

Summary

Greece is very dependent for financing her imports on the foreign exchange from tobacco exports which accounts for about 40 percent of total foreign exchange earnings. Greek production and exports of tobacco suffered badly in the unsettled period immediately after World War II until about 1951-52. Since 1952, production and exports have risen sharply. These trends are expected to continue, but at slower rates than currently.

Western Europe is by far the largest export market for Greek tobacco. The United States is second. Exports to Western Europe since 1950 have risen sharply, while shipments to the United States have only risen since 1954 and did not reach prewar levels until



1955. Shipments to the Communist nations are still small, but were up significantly in 1957.

Bilateral trade agreements are used widely to promote tobacco exports.

Importance of Tobacco in the Greek Economy

Tobacco, the largest Greek export, recently has accounted for about 40 percent of Greece's total foreign exchange earnings. The country, in recent years, has been the eighth or ninth largest producer and third or fourth largest exporter of tobacco. In the 1950-57 period approximately 83 percent of total tobacco production was for export.

Since the immediate postwar low in the 1945-49 period exports have risen sharply to an alltime high in 1957. Nearly all of the recent (since 1951) increase in exports has been to Western Europe, (primarily Western Germany) and the United States. Total Greek tobacco exports are expected to continue trending upward, but they are likely to face greater competition, mainly in Europe, from Bulgarian and Yugoslav leaf.

Production

Unsettled political and economic conditions (including severe currency inflation) immediately after World War II, prevented the production and exports of tobacco from recovering their prewar levels until 1952 and 1953, respectively. Production reached a record high in 1957--about 15 percent above the previous high in

TABLE 7.--Greece: Production and exports of tobacco, average 1935-39 and 1945-49, annual 1950-57

Year	Production[1]	Exports[2]
	Million pounds	Million pounds
Average:		
1935-39	133	98
1945-49	78	36
Annual:		
1950	128	56
1951	137	69
1952	87	91
1953	134	108
1954	141	116
1955	213	121
1956	181	110
1957	240	149

[1]Farm sales weight. [2]Fermented weight.

1955. Because of a reduction in acreage and unfavorable weather, output was reduced substantially in 1956.

Production by Type

There are about 12 commercial types of tobacco produced in Greece and all but 3 of these are classed as aromatic. There is some flue-cured grown and Black Argos which cannot be properly classed as aromatic types. These main aromatic types are Basma, Smyrna aromatic, Samsun, Kaba Koulak, Bachi-Bagli (three main subgroups of Prosotchan and Etoloakarnania), Saria and a number of crosses or strains, which have been acclimated to new producing areas (introduced from the Macedonia and Thrace areas of Greece or from Turkey). These crosses as well as the adapted strains developed from traditional varieties (now grown at a lower elevation in old producing areas) and those recently introduced to southern and western Greece include Marva of Argos, Marva of Thessaly, Djebel of Agrinion, Zichna of Kanaloin, Trabizond and Saria. Marva of Thessaly, Marva of Argos, Black Argos (at least the portion grown on irrigated land) should no longer be classed as an aromatic type. Basma accounts for about half the acreage and about 40 to 45 percent of production. Samsun accounts for roughly 9 percent of production (and is increasing in importance) and Smyrna aromatic and Bachi-Bagli types 8 to 10 percent each. Kaba-Koulak contributed approximately 5 percent, Agrinion aromatic 4.7 percent, Djebel Agrinion or Tzembelia 9 percent, Saria accounts for less than 1 percent, and all other aromatic types less than 1 percent. The Marva (or Black Argos) accounts for 4 percent and Marva of Thessaly 6.7 percent. Virginia accounts for a total of only about one-tenth of a percent.

As indicated above, the small leaf Basma is by far the most important type. Basma is grown mostly in Western Thrace and Eastern, Central, and Western Macedonia. The best qualities are in the areas of Xanthi, Komotini, Chryssoupolis, Machata, Kyrghia, Serresand, Nigrita and Pravi. There are many gradations of quality associated with Basma produced in various areas. The following are based on an evaluation by the Tobacco Institute at Drama, Greece:

TABLE 8.--Greece: Tobacco production by variety and percentage of total, 1955-57

Kind	1955		1956		1957	
	Quantity	Percent of total	Quantity	Percent of total	Quantity	Percent of total
	Million pounds	Percent	Million pounds	Percent	Million pounds	Percent
Basma.....	82.0	39	68.5	38	87.9	37
Bachi-Bagli...	15.2	7	11.1	6	19.5	8
Kaba-Koulak...	11.0	5	9.2	5	13.5	6
Samsun.....	25.6	12	27.0	15	29.6	12
Trabzun.....	1.4	1	1.1	1	2.4	1
Aromatic (Smyrna)....	25.6	12	17.9	10	25.8	11
Black Thessaly	19.2	9	13.7	8	21.6	9
Saria.....	.8	(1)	1.1	(1)	.8	(1)
Kavalia.....	1.6	(1)	1.1	(1)	1.8	(1)
Tzemeblia.....	11.5	5	14.9	8	17.8	7
Aromatic Agrinion....	7.9	4	8.8	5	8.8	4
Black of Argos	10.8	5	6.8	4	10.2	4
Virginia (flue-cured)	.2	(1)	.2	(1)	.1	(1)
Other.....	--	--	(2)	--	(3)	--
Total	212.8		1.4		239.8	

[1]Less than 1 percent. [2]45,000 pounds. [3]22,000 pounds.
Agricultural Report Number 27, Mar. 25, 1958 (taken from Tobacco Review).

I. Basma

A. Basma-Superior--Most of the superior quality Basma is from the areas of Xanthi, Mahala and Zichna. Only the better quality leaf grades of Xanthi and Zichna.

Xanthi	Mahala	Zichna
1. Xanthi Yaka I	1. Kar	1. Zichna I (Mt. Slopes)
2. Xanthi Yaka II	2. Mahaladakic	2. Zichna II (Plains)
3. Xanthi and Chrys-soupolis Djebel		
4. Xanthi Sougialessi		
5. Xanthi Dere Kolou		
6. Saria Chaban Yaka I		
7. Saria Chaban Djebel		

B. Basma-Medium--Most of the medium Basma is from Xanthi, Kavala, Komotini, Pravi, Drama, Serres, Nigrita and Sidhiro-kastron. Most of the Basma from these areas is classed as medium but only leaf from certain elevations in Xanthi is classed as medium quality. These mediums for Xanthi include: (1) Orta Koloy, (2) Yaka II, (3) Sovan Yaka, and (4) Saria Chabou (Yaka II and Djebel II), and that from Komotini and only three groups

from Yaka I, Yaka II, and Morovia are classed as medium quality Basma. Most of the Basma, except the "Ova," that is produced around Kavala, Drama, Pravi, Serres and Sidhirokastron and Nigrita are classed as medium in quality.

C. Basma-inferior or lower quality--Most of the ovas (leaf grown on lowlands) from many areas, such as Xanthi, Drama (also Bair Kolou and Sovan Yaka) (also Boukia), Kavala, Pravi, Serres and Nigrita are classed as inferior or low quality Basma. Practically all of the Basma (Yakas, Ovas and Djebels) regardless of elevation grown around Sohos, Langada, Kilkis, Kozani, Zanghueri, Grenena, Voion, Siatista, Yiannitsa, Kastoria, Almopia, and Naoussa, are classed as inferior or of low quality. Etoloakarnania leaf from Astak, Messolongi, Katouna and Aluiso are sometimes included as inferior or low quality Basma, but this tobacco probably should more properly be considered as medium quality Bachi-Bagli as the characteristics of most of this leaf are more similar to the Bachi-Bagli types or strains.

II. Bachi-Bagli

The Greeks classify the three main or distinctly different larger leaf aromatic types of Prosotchani, Trebizonde (Trabizon) and Etoloakarnania as sub-types of Bachi-Bagli, although they are quite different in characteristics and in other countries may be considered separate types. The Prosotchani leaf is grown in Prosotcha of Drama, Tsets and Zangliveri and Langada of Central Macedonia; Trepizonde is produced at Yiannitsa, Zangliveri and Axioupolis areas of central and west Macedonia and Etoloakarnania grown at Messolongi and Agrinion.

III. Samsun (same type as grown at Samsun, Turkey)

This type was fairly recently introduced in Greece and is produced in the Katerini area of Macedonia. It is often known as "Katerini tobacco."

IV. Kaba-Koulak

Kaba-Koulak is grown primarily at Pravion, Kilkis, Verria and Karadjovo in Macedonia and various crossed-bred Koulak types are produced at Langada, Yiannitsa, Kozani, Almopia and Naoussa.

V. Smyrna Aromatic (same type as at Izmir, Turkey)

Smyrna aromatic is grown at Theves in the Attica area, Kailar in central Macedonia, Florina, Kozani in Western Macedonia as around Salonika, Naoussa and in the Aegean Islands. Myradota of Palocastron is sometimes classed with Smyrna but may be a Basma-Smyrna cross. It is grown in and around Mitropolis in the Karditsa area of Thessaly.

VI. Aromatic of Agrinion

Originated in Agrinion area of Etoloakarnania district. It was developed from Bachi-Bagli grown in Macedonia. It is now considered a separate type.

VII. Djebel of Agrinion or Tzembelia

This leaf grown in the lowlands is grown mainly in Etoloakarnania part of Greece, but some is produced in Epius. The production in Etoloakarnania is mainly in the area of Agrinion, Katoune (Catuna), and Valtos. Some Greek authorities think this is a variation of the "Black of Thessaly" grown in the Lamia area.

VIII. Marva

This heavier black leaf is grown in two areas and is known as Marva or Black of Argos and Marva of Thessaly. These appear to be Kaba-Koulak strains with the lowland Marva of Thessaly fairly similar to Kaba-Koulak but Black Argos of the Peloponesius (some of which is irrigated) is dark and thick with a much larger leaf.

IX. Saria

Saria is classed separately, but is believed to be a light colored strain of Kaba-Koulak. It is grown in the localities of Almiros, Lamiad and Trikhala in Thessaly.

X. Zichna of Kanaloin (Canal)

This is a cross between Zichna (Basma) of Macedonia and a local variety of Marva and is produced at Karditsa, Thessaly.

XI. Virginia or flue-cured

A flue-cured type is produced in the valley of Northwest Greece near the Yugoslavian border.

Buying and Selling Arrangements

There are no auction markets. Buying and selling arrangements are about the same as in Turkey--direct negotiations between the buyer and the farmer. However, private companies purchase the leaf used in domestic manufacturing because Greece has no tobacco monopoly such as that in Turkey.

Government Participation

The government encourages production and exports of tobacco. Although interest rates are still high, the government grants loans to tobacco farmers at rates that are lower than can be obtained elsewhere. The farmers' tax on leaf tobacco production has recently been eliminated.

Tobacco merchants are assured a certain amount of credit to finance the cost of purchasing, manipulating, and storing the leaf. Further, in 1956 the government made available enough funds to finance the purchase of about 20 million pounds of leaf in order to maintain prices to farmers and secure supplies to meet specific export accounts.

Until 1957 the Hellenic Tobacco Board was responsible for many aspects of production, export promotion, and programs for improving quality, grading, and packing. A new organization, The National Tobacco Organization, supplanted the Hellenic Tobacco Board in 1957. This new organization may intervene in the tobacco market whenever necessary to establish normal relations of supply and demand. This appears to be a move toward establishing the machinery for controlling production and participating more actively in supporting prices.

Greece relies very heavily on the use of bilateral agreements to assure export outlets for tobacco. In 1956, Greek tobacco was exported to foreign countries under 31 bilateral agreements. These agreements were mainly with Western Europe and the Soviet Bloc countries. Shipment of tobacco to bilateral agreement countries accounted for 78 percent of all Greek tobacco exports.

Exports

In the prewar period (1935-39), Greece exported an average of 98 million pounds of tobacco annually. During this period, Germany's takings accounted for about half of total Greek exports of tobacco. Before the war the United States took about 20 percent of foreign shipments. In normal years Greece also exported small amounts (100,000 pounds to 2.8 million pounds) to each of several other countries. In 1946 Greek exports were only a fourth of prewar, but foreign shipments rose rapidly by 1949, and topped the prewar average by 1953. In the 4 years (1954-57) Greece exported an annual average of 124 million pounds of tobacco. During the 1954-57 period, West Germany took 33 percent of total tobacco exports. East Germany imported 2.5 percent of total foreign shipments.

In the 1954-57 period the United States, the second largest importer, took about the same as prewar. U.S. imports in the past 5 years represented one-sixth of Greece's total foreign shipments. France, Austria, Italy, the Soviet Union, and Belgium have recently been the next largest importers and takings of all of these have been rising. The countries of Western Europe (excluding Germany) imported an average of 41 million pounds in 1955 and 1956, compared with about 14 million pounds prewar. France, Austria, Italy, Belgium, Finland, the United Kingdom, and a number of other countries all took substantial amounts each year. In the 1954-57 period the USSR took an average of 5.1 million pounds annually. Trade with the Soviet Bloc countries is expected to increase. Greek exports to the Soviet Bloc rose sharply in 1957 to slightly below those of 1953 and 1954, but well above those in 1955 and 1956.

Domestic Use

Approximately 26 million pounds of fermented leaf are used each year. Commercial manufacture of cigarettes has expanded greatly since World War II. The amount of leaf used in the commercial manufacture of cigarettes nearly doubled between 1938 and 1957.

TABLE 9.--Greece: Exports of leaf tobacco to selected areas, average 1935-39 and 1945-49, annual 1950-57

Area	Average		1950	1951	1952	1953	1954	1955	1956	1957
	1935-39	1945-49								
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States.....	20	13	11	11	14	13	14	23	21	30
Western Europe[1].....	52	22	39	51	71	69	77	83	75	97
Eastern Europe[2].....	19	1	--	--	--	13	17	8	7	13
Other[3].....	7	4	6	7	6	13	7	7	7	9
Total.....	98	40	56	69	91	108	115	121	110	149

[1]Includes United Kingdom, Belgium, Denmark, France, Finland, Italy, Netherlands, Norway, Spain, Sweden, Switzerland, Austria, and West Germany. For 1935-39, 12 million of the 48 million average going to Germany was deducted from Germany and added to Eastern Europe in order to make the data comparable with later data. [2]Includes Eastern Zone of Germany, Yugoslavia, Czechoslovakia, Hungary, Poland, Bulgaria, and the Soviet Union. [3]Includes exports of smaller amounts to countries not in above classification.

TABLE 10.--Greece: Exports of leaf tobacco, by country of destination, 1950-57

Country of destination	1950	1951	1952	1953	1954	1955	1956	1957
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	11.4	10.9	13.8	13.3	14.3	22.7	20.8	29.5
West Germany	14.1	17.3	40.9	34.8	37.9	41.7	34.9	50.9
United Kingdom	1.1	1.6	2.1	3.8	2.5	2.8	1.2	2.0
Austria	4.8	5.6	5.0	6.8	6.8	5.8	9.6	8.0
Belgium	--	.1	.4	.6	.9	3.4	4.7	5.7
Denmark	.9	.3	(1)	.2	(1)	--	--	--
France	6.7	15.8	13.0	9.8	10.6	13.3	9.3	12.3
Finland	4.5	2.2	3.0	2.0	4.2	2.9	4.1	2.5
Italy	3.2	5.6	1.5	3.5	9.5	7.9	6.1	10.2
Netherlands	.3	.4	.2	.7	.3	1.3	.6	.9
Norway	.2	(1)	.3	.1	(1)	--	--	--
Spain	--	--	--	2.4	.4	--	--	--
Sweden	1.6	1.2	2.9	2.0	1.0	1.0	1.6	2.4
Switzerland	1.9	1.1	2.2	2.2	2.9	3.5	2.7	2.0
East Germany	--	--	--	4.1	6.5	2.6	1.7	1.8
Yugoslavia	--	--	--	5.0	.2	--	--	--
Czechoslovakia	--	--	--	--	--	--	.3	1.0
Hungary	--	--	--	4.2	2.4	3.9	.6	3.4
Poland	--	--	--	--	--	--	.5	.5
U.S.S.R.	--	--	--	--	8.2	1.4	4.3	6.7
Other[2]	5.5	7.3	6.1	12.4	7.0	7.1	7.4	9.1
Total	56.2	69.4	91.4	107.9	115.6	121.3	110.4	148.9

[1]Less than 100,000 pounds. [2]Not otherwise accounted for, probably small shipments.

TABLE 11.--Greece: Tobacco used in commercial manufacture of cigarettes for domestic consumption, 1938, 1948, and 1950-57[1]

Year	Amount Used[2]	Year	Amount Used[2]
	Million pounds		Million pounds
1938	12.6	1953	22.2
1948	21.2	1954	22.5
1950	21.7	1955	23.0
1951	21.6	1956	23.1
1952	21.5	1957	24.1

[1]Excludes tobacco used directly on the farms where it is produced. [2]Fermented weight.

Soviet Union

Summary

Acreage and production, especially of oriental, increased significantly in the 1945-54 period. However, according to Soviet statistics the acreage of oriental has declined slightly since 1954. There was a very rapid rise in acreage of Mahorka, a dark air-cured type, just after World War II with a peak of 270,000 to 285,000 acres in the 1948-51 period, but the level has declined by approximately 25 percent since that time. However, with the increased availability of fertilizers and other production items in recent years the level of production has not declined in proportion to the decrease in acreage.

Since 1945 imports of leaf mainly from Bulgaria, Communist China, and Turkey have been far above prewar. However, some of the leaf reported as exported to the Soviet Union was actually transshipped or re-exported to other countries, mainly to the other Communist areas of Eastern Europe.

Production of a number of agricultural items in the Soviet Union is short of demand and this appears to be the case with the light cigarette types of tobacco. But the import policy followed by the Soviet Union in regard to tobacco is designed to meet certain propaganda objectives as well as to fulfill trade and economic needs. The Soviet Union, like a number of other Communist countries, pays higher prices (in terms of exporting country currencies) for tobacco purchased from the Free World (especially from Turkey) than do many of the countries of the Free World. This is of importance for propaganda purposes. However, it should be pointed out that many of the items, especially manufactured goods, exchanged by the Communist countries for tobacco are quoted at much higher prices than quoted by Free World sources (in some cases more than 40 percent above the prices of similar items exported from West Germany, the United Kingdom, or the United States).

Production

In the 1935-38 period about 53 percent of Russia's total tobacco acreage was Mahorka. Total tobacco production in this prewar

period was estimated at about 540 million pounds annually--about 61 percent Mahorka and 39 percent other kinds of tobaccos. In the 1947-49 period after World War II the acreage of Mahorka is believed to have regained the prewar (1935-39) level and remained there until 1953. Soviet statistics show that Mahorka acreage decreased sharply in 1954 and 1955, and even further in 1956. Output of Mahorka, however, has not declined as sharply as has the reduction in acreage since 1953. Yields were very low just after World War II but wider use of fertilizer and other production aids has increased them substantially.

The shift from Mahorka production to the growing of more oriental leaf has been deterred by labor and economic difficulties. Mahorka is a lower priced, large-leafed, strong dark tobacco which produces high yields per acre. Much less labor is needed to produce an acre of Mahorka than that required to grow an acre of oriental. Furthermore, Mahorka yields two to four times more per acre than oriental. Labor is not efficiently used in Soviet agriculture and, by Soviet standards, is in short supply due to drains by expanding industrial production. A higher priority in production of other items may be a factor in not further increasing the production of light tobaccos. Or this may be a part of the state planning which may allow for fairly large imports of tobacco from certain countries which the Soviet Union is making great efforts to influence.

The acreage of oriental and semioriental tobaccos (most of which is oriental) rose sharply from the 1930 level to a pre-World War II high in 1938, but was reduced sharply during and immediately after the war. It is believed to have risen to about the prewar level by 1948, although yield per acre was well below prewar. It continued the upward trend through 1954 and has declined slightly since that time. Increasing yields, however, have caused production to rise significantly in recent years. This, combined with much larger imports of light tobaccos (mostly oriental and flue-cured), indicates a marked shift to increased use of light type cigarettes produced chiefly from oriental leaf.

Production by Type

There are six major categories of tobacco produced in the Soviet Union, namely Mahorka, Bakum, Ostrolist (pointed leaf), Oriental varieties, American cigarette varieties, and some cigar types. The Ukraine, Belorussia (White Russia) and the R.S.F.S.R. produce most of the Mahorka. The main cigarette type tobaccos are: (1) oriental (2) Ostrolist and (3) American cigarette varieties.

Mahorka. Mahorka is a Nicotiana Rustica which has a large heart-shaped, dark brown leaf, is coarse in texture, is very strong and has a distinctive aroma. The acreage of Mahorka exceeded the total of all other types until 1953, and production was much greater than that of other tobaccos because Mahorka yields far more than other types. It is produced mostly in the Ukraine, R.S.F.S.R. (Russian Soviet Federated Socialist Republic), and the southern part of Belorussia (European White Russia), with some in western Siberia. At the beginning of World War II (1940) there was about 95,000 acres of Mahorka and 35,000 acres of other tobaccos produced in the Ukraine. It is reported that there are 20 to 25 varieties or sub-types of Mahorka.

TABLE 12.--Soviet Union: Estimated area of Mahorka and other types of tobacco, 1913 and 1923-56

Year	Mahorka	Other	Total
	1,000 acres	1,000 acres	1,000 acres
1913	81	73	154
1923	59	55	114
1924	90	55	145
1925	114	96	210
1926	140	93	233
1927	116	105	221
1928	89	112	201
1929	106	116	222
1930	101	133	234
1931	266	230	496
1932	264	245	509
1933	260	223	483
1934	253	220	473
1935	265	222	487
1936	273	228	501
1937	264	230	494
1938	258	236	494
1939	258	240	498
1940	262	223	485
1941	(1)	(1)	(1)
1942	(1)	(1)	(1)
1943	(1)	(1)	(1)
1944	(1)	142	(1)
1945	235	160	395
1946	240	205	445
1947	260	240	500
1948	220	245	465
1949	270	245	515
1950	274	251	525
1951	274	248	522
1952	270	260	530
1953	265	275	540
1954	242	286	528
1955	222	271	493
1956	203	260	463

[1]Not available.

Bakum. Bakum tobacco (formerly considered primarily as a pipe tobacco) is grown chiefly in the Ukraine. It has large round leaves which are chocolate brown and coarse in texture. Little current information about this type is available, but just prior to World War II Russia produced about 4.5 million pounds, mainly for export to Poland and Czechoslovakia.

Ostrolist. Ostrolist is grown mainly in the Ukraine and Krasnodar-Krai regions. Little is known as to its characteristics and use, but production is believed to be relatively small.

Oriental. The Black Sea coast (primarily Krasnodar area), Crimean region, Georgia, Armenia, and North Caucasus are the

TABLE 13.--Soviet Union: Tobacco acreage, by types and districts, 1950-56

Type and district	1950	1951	1952	1953	1954	1955	1956
Mahorka:	Acres	Acres	Acres	Acres	Acres	Acres	Acres
R.S.F.S.R.[1]	156,463	157,773	156,341	149,494	131,827	113,049	103,659
Belorussia (White)..	20,213	18,409	19,644	20,831	19,990	18,829	20,658
Ukraine....	88,635	89,277	86,905	87,548	83,767	85,966	74,451
Georgia....	74	99	99	74	49	99	74
Azerbaijan.	74	25	74	74	99	74	74
Uzbekistan.	2,669	1,359	371	346	198	124	198
Kazakhstan.	6,029	6,746	6,103	6,375	5,486	3,632	3,805
Tadzhik....	25	--	49	25	25	--	--
Kirghiz....	99	99	148	198	99	148	148
Latvia.....	25	25	25	25	--	--	--
Lithuania..	148	49	25	--	--	--	--
Total....	274,454	273,861	269,784	264,990	241,540	221,921	203,067
Other:							
R.S.F.S.R.[1]	58,339	58,612	56,981	57,970	56,611	44,997	39,363
Belorussia (White)..	371	--	--	--	--	--	--
Ukraine....	52,237	55,598	56,018	61,503	63,332	62,912	60,145
Moldavia...	18,928	24,858	33,136	39,585	42,007	41,562	39,956
Georgia....	31,481	27,453	27,527	27,428	32,296	35,706	36,596
Armenia....	24,932	24,957	26,662	27,972	27,650	22,956	19,669
Azerbaijan.	19,719	12,652	13,072	12,577	15,024	14,801	18,112
Uzbekistan.	14,035	13,936	15,123	15,617	16,803	15,567	15,740
Kazakhstan.	13,393	13,319	13,541	13,566	13,492	13,541	11,960
Tadzhik....	1,656	1,581	2,199	2,100	2,298	2,125	1,211
Kirghiz....	14,011	13,986	15,221	16,457	16,457	16,309	16,753
Other.....	2,026	865	494	346	271	197	148
Total....	251,128	247,817	259,974	275,121	286,241	270,673	259,653

[1]Russian Soviet Federated Socialist Republic.
Official Soviet Union statistics.

main producing regions for oriental tobaccos. Smaller amounts are produced in Uzbekistan, Kirghizia and Kazakhstan.

The major oriental groups are Samsun, Trabzon, Tyk-Kulak and Yalta-Dubek.

Trabzon types are produced in the Krasnodar, eastern Black Sea shore, Abkhazya, Transcaucasus, and Central Asia.

Samsun types are produced mainly on the eastern Black Sea shore in the Abkhazya, Transcaucasus, and Central Asia.

Tyk-Kulak types are grown in the Krasnodar, Ukraine, and Central Asia.

Yalta-Dubek is a special Yalta type of Xanthi Basma seed that is grown primarily in the Crimea and Central Asia.

Samsun (types 25, 27, and 1957), Trabzon (93, 1268, 1272, and 1867), Tyk-Kulak or Tykulak (92 and 235), Yalta, and Yalta-Dubek or Dzhubek (44 and 2386), (which are Xanthi Greek Basma types) are the main oriental groups grown. The major oriental tobaccos are

known by the following place names: Sukhumi Georgian, Sochi Adler, Kuban, Mikop, and Yalta. The Sukhumi, Adler, Crimean, and Yalta tobaccos are considered to be the most aromatic Soviet types.

Sukhumi and Adler tobaccos are mostly of the Samsun and Baffra (Turkish) types, although some oriental in the Sukhumi area developed from Trabzon seed. Sukhumi and Adler tobaccos are grown principally in the Black Sea districts along the Caucasus Mountains - Abkhazian, Georgian, Adjar, and Armenian Republic. Sochi is a large leaf, Trabzon type, and the Georgian types are classed as flavorful, oriental tobaccos. Sochi is produced in Krasnodar Territory (Black Sea Coast) and in the Armenian and Abkhazian Republics. Georgian is grown in the Georgian Republic.

Yalta types belong to the Xanthi Greek type of Basma and are produced in the Crimean Peninsula and in the Kirghizia, Kazakhstan, Uzbekistan Republics. The Crimean type, also a Xanthi Basma type, is grown in the south coast of the Crimean peninsula.

Kuban and Mikop tobaccos are Trabzon varieties that have smaller leaves than the original Trabzon type from Turkey and are considered to be neutral filler types of oriental and are often classed as of the Kaba-Kulak (Turkish) group. Kuban tobaccos are grown primarily near the Kuban River in the Abinsky, Krymsky, Seversky, and Goryachy Klyuch districts of the Krasnodar territory, as well as in the Uzbekistan, Kirghizia and Kazakhstan Republics. Mikop tobacco is produced in the Krasnodar territory, primarily in the Apsheron, Armyansky, Mostovskoy, Ryazansky, Yaroslavsky, and Byelorechensky districts. Both the Kuban and Mikop types are sometimes flue-cured.

Sukhumi-Samsun and other sub-types of Samsun have been the best known export types and, prior to 1950, limited quantities of these were imported by the United States and several countries of Western Europe.

American Cigarette Types. Although relatively unimportant, small amounts of the American cigarette types including flue-cured, Maryland, and Burley are reportedly produced mainly in the Crimea, but the amounts are unknown. Probably most of the flue-cured are the Kuban and Mikop types of Trabzon leaf rather than the Virginia Types of flue-cured produced in the United States.

Cigar. Cigar tobaccos are grown mostly in the Ukraine, Abkhazya, and Bryansk areas. Dvitski type tobacco produced along the Desna River in the Ukraine and a long, dark leaf type grown along the Volga were formerly the main cigar types but no recent information is available on cigar varieties and production. Cigar leaf is believed to account for 1 to 2 percent of total tobacco production.

Trade

In the immediate prewar period (1934-38) the Soviet Union exported from 4 million to 13 million pounds of leaf annually. The largest importers of Soviet leaf in those years were Germany, Poland, Czechoslovakia, the United States, and Finland. There are no accurate data available on recent exports. However, fairly large amounts of Bulgarian (since 1944) and Chinese (since 1952) have been handled as transshipments or re-exports to other areas.

During the immediate prewar period (1934-38) the Soviet Union imported an average of about 3 million pounds of leaf per year. Since World War II, it has imported much larger quantities. In

the 1952-57 period, imports appear to have ranged from about 75 million to 150 million pounds annually. The largest suppliers have been Bulgaria, Communist China, Greece, and Italy, but quantities have been shipped from Yugoslavia, Iran, Turkey, and Hungary in some years.

Between 1944 and 1954 the Soviet Union sharply increased its purchases of Bulgarian tobacco but since 1954, takings from that source may have declined. A considerable portion of the Bulgarian leaf taken since World War II appears to have been transshipped or re-exported. However, since 1954 there may have been a decrease in such re-exports partly as a result of direct exports from Bulgaria to the consuming countries in both Eastern and Western Europe. The apparent decline in amounts taken from Bulgaria in recent years may be partly caused by rising production of oriental in the Soviet Union, and partly because the opportunity to re-export Bulgarian leaf to other Soviet Bloc countries has lessened. Since 1952, unofficial reports have indicated large exports of Chinese flue-cured tobacco to the Soviet Union. Accurate data are not available on this aspect, but some of the Chinese tobaccos shipped to the Soviet Union, reportedly have been used in Czechoslovakia and the Eastern Zone of Germany.

In 1949, the Soviet Union again began to import leaf from Italy and the amounts taken have been increasing. An average of about 6.5 million pounds was imported annually from Italy in the 1954-56 period. The USSR took almost 7 million pounds of tobaccos from Italy in 1956, but had not taken any in 1957 by the end of October. Imports from Greece were resumed in 1953 and have averaged 5.6 million pounds per year since that time. Imports from Yugoslavia were fairly large in the years immediately after World War II, but were discontinued entirely in the 1950-53 period. Imports from Yugoslavia were resumed in 1954 and have risen from 700,000 pounds that year to 4.9 million in 1955 and further to 9.2 million in 1956, but declined to 5.2 million in 1957.

Soviet leaf imports are very strongly influenced by political and propaganda objectives as well as the usual economic considerations.

The increased imports of tobacco by the Soviet Union in recent years represent (1) an effort to meet increasing domestic demand for cigarettes, (2) inadequate domestic production of cigarette tobaccos due to increasing competition for cropland by other crops, and (3) increased foreign purchases in selected areas partly for the purpose of propaganda and political influence.

Cigarette Production

Machine production of cigarettes has risen steadily to 215 billion pieces in 1957 compared with 203 billion in 1956, 183 billion in 1953, 158 billion in 1952, 125 billion in 1950, and 100 billion to 120 billion in 1939 and 1940. The papirosy type (which is about half tobacco and half empty cardboard mouthpiece) accounts for over half of the cigarettes consumed. There appears to have been a recent marked shift to increased use of cigarettes made of light types of leaf, although dark tobaccos including Mahorka are still very important.

Bulgaria

Summary

Bulgaria is the fourth largest producer of oriental types of tobacco ranking after Turkey, Greece, and the Soviet Union. Tobacco production plays an important part in the Bulgarian economy. Since World War II and particularly since 1950 Bulgarian tobacco production has increased and over 70 percent of output since 1950 has been for export.

Tobacco differs from other crops which are cultivated by a so-called "brigade system." Its production is entrusted to agricultural households. Such family groups do all the production work up to delivery of the cured leaf.

Production of oriental leaf has risen significantly since World War II, especially after 1950. Some further expansion is expected in the next few years, but the level of export demands may be the most important limiting factor. About 70 percent of the tobacco produced since 1950 has been for export. Production in 1955 and 1957 appears to have been so large that the Bulgarians are having great difficulty in finding export markets to absorb current surplus stocks. In recent years, the bulk of exports has been to the Communist nations of Eastern Europe, especially the Soviet Union, Czechoslovakia, East Germany, and Poland.

Currently Bulgaria appears to be making an effort to move more tobacco directly to Western Europe and the United States to avoid the chance of it being in the re-export trade of Communist Bloc countries.

Production by Area and Type

There is wide variety in the types and quality of tobaccos grown in Bulgaria's various regions primarily because of prevailing climatic and soil conditions in these areas. There are two main types of oriental - Basma and Bashi Baly--and two intermediate types--Sighirdili and Kaba Kulak. The latter two are relatively unimportant. Bashi-Baly (Bagli) types account for about two-thirds of the acreage with Basma making up most of the remainder. There are three major commercial grade groups for each type based primarily on elevation of the producing area: (1) Djebel (mountain generally 2,800 to 3,300 feet above sea level) is the highest quality; (2) Yaka (foothills) is second; and (3) Ova (lowland) is the lowest.

The main tobacco-producing areas are in Southern Bulgaria in the regions known as Macedonia and Thrace. The three most important producing provinces (or Okrugs) are Khaskovo (formerly part of the province of Stara Zagora), Plovdiv, and Blagoevgrad (formerly part of Sofia Province) near the Greek border and the southern portion of Sofia Province adjacent to the Yugoslav border.

The best quality leaf is grown in Okoliya (counties near the Greek border). These include Khaskoco, Kharmandi, and Jurdzhali counties of Khaskovo Province; Nerrotop, Plovdiv, Asenorgrad (old Stanimaka) and Peshtera of Plovdiv Province; and Balgoevgrad (formerly Grona Djumaya), Petrich and Sandanski (formerly Sveti Vrach) counties of Blagoevgrad Province.

Bashi-Baly is grown primarily in the Macedonian section especially Krumoygrad and Ivayovgrad counties) Khaskovo Province and Sanke Dimitrov (formerly Dupnitza) county of Sofia Province.

TABLE 14.--Bulgaria: Estimated acreage and production of unmanufactured tobacco, by types, average 1935-39, annual 1940-57[1]

Year	Area			Production		
	Oriental	Flue-cured	Total	Oriental	Flue-cured	Total
	1,000 acres	1,000 acres	1,000 acres	Million pounds	Million pounds	Million pounds
Average:						
1935-39...	(2)	(2)	91.0	(2)	(2)	75
Annual:						
1940.....	(2)	(2)	130.1	(2)	(2)	96
1941.....	(2)	(2)	129.7	(2)	(2)	86
1942.....	(2)	(2)	119.2	(2)	(2)	91
1943.....	(2)	(2)	134.2	(2)	(2)	83
1944.....	(2)	(2)	109.8	(2)	(2)	71
1945.....	(2)	(2)	112.8	(2)	(2)	50
1946.....	(2)	(2)	180.1	(2)	(2)	89
1947.....	(2)	(2)	154.0	(2)	(2)	105
1948.....	(2)	(2)	131.0	(2)	(2)	44
1949.....	(2)	(2)	163.1	(2)	(2)	97
1950.....	(2)	(2)	143.3	(2)	(2)	73
1951.....	190.3	11.9	202.2	128	11	139
1952.....	220.2	10.6	230.8	90	7	97
1953.....	241.7	10.1	251.8	115	11	126
1954.....	221.6	14.1	235.7	106	13	119
1955.....	209.8	12.1	221.9	145	13	158
1956.....	210.0	11.0	221.0	106	10	116
1957.....	220.0	12.0	232.0	160	12	172

[1]Farm sales weight. [2]Data by types not available.

"Djebel" Bashi-Baly is grown mostly in the Macedonia region especially in Kurdzhali, Ivaylovgrad and Krumoygrad counties in the southeast part of Bulgaria near Greece. "Yaka" Bashi-Baly is grown mostly in the Macedonia region and in Plovdiv and Khaskovo Provinces. "Ova" Bashi-Baly is produced mostly in Plovdiv and Khaskovo Provinces, although a small amount is grown farther north.

Basma is produced primarily in Krumoygrad, Kurdzhali and adjacent counties of Khaskovo Province in the Macedonian region and Asenoygrad (old Stanimaka) and Peshtera counties of Plovdiv Province. Quality of Basma produced near the Greek border is far superior to that grown in Asenovgrad and Peshtera.

Fermentation Process

Bulgaria has been using fast fermentation (high temperatures and humidity) rather than natural fermentation. This process has resulted in a significant decrease in the average quality of leaf, especially of the better grades (1, 2, and 3). It causes deterioration in aroma and, in some cases, color. The fast fermentation process is used to speed consumption or exports after harvest and thereby

recover the investment and obtain profits and foreign exchange earnings sooner than would otherwise be possible.

Exports

In the immediate prewar period (1935-39) Bulgaria exported an average of 54 million pounds of leaf annually. Germany took about 70 percent of total exports. The next largest buyers were France, Italy, Poland, Austria, Czechoslovakia, and the United States and small amounts were imported by every country of Europe except Yugoslavia and Greece. During World War II the major part of the exports went to Germany but, small supplies were shipped to practically all of the countries which formerly imported from Bulgaria, except the United Kingdom and the United States. For several years the Soviet Union has dominated the tobacco export trade of Bulgaria. Since World War II, the Soviet Union has taken about 70 percent of all foreign shipments of Bulgarian leaf, but some of this was transshipped or re-exported to other countries, particularly to the other Communist areas of Europe.

In some cases the packing materials and markings for Bulgarian as well as Hungarian tobaccos, purchased by the Soviet Union have been reported as furnished directly by the Soviet Union. If this is the case it may be an effort to obscure the origin of the leaf from either Russian factory workers or the buyers in the countries to which these tobaccos are transshipped or re-exported.

Excluding the Soviet Union, the largest importers of Bulgarian leaf since World War II have been Czechoslovakia, Poland, East Germany, France, Austria, and Italy, although exports to Italy have declined sharply since 1955. Direct shipments to Eastern Germany rose significantly in 1956 over the 1950-54 average. In addition significant quantities of Bulgarian leaf are probably transshipped or re-exported from other countries to East Germany.

Bulgaria is trying to increase her exports to Western European countries and the United States and, since 1953, has significantly increased exports to a number of countries of Western Europe--mainly to France, Belgium, West Germany, and Austria. Shipments to East Germany and Egypt are also up.

Products

Data on the output of manufactured tobacco products in Bulgaria are not readily available. It is estimated that cigarette usings make up 85 to 90 percent of the total manufactured tobacco.

TABLE 15.--Bulgaria: Production of cigarettes, 1953-55

Year	Cigarettes	Leaf used
	Million pounds	1,000 pounds[1]
1953	8,395	18,649
1954	9,275	20,405
1955	8,860	19,492

[1]Fermented weight.

Yugoslavia

Summary

Production and exports of tobacco have been rising rapidly, especially since 1954. The trend of expanding foreign trade is expected to continue, but probably at a much slower rate mainly because of increasing competition from rising exports of other oriental producing countries.

Production

Production of leaf tobacco in 1957 was almost double the poor crop of 1956 and about three times the average in the 1950-53 period. The 131,000 acres planted in 1957 was about 19 percent above the previous high of 110,000 acres in 1955. The current 5-year plan includes provisions for increasing tobacco further to about 131 million pounds by 1961. A recent Yugoslavian survey indicated that an adapted soil area 5 to 7 times as large as the present area devoted to tobacco could be used for tobacco production, but domestic and export demand rather than area of appropriate soils and number of farmers will determine the level of future production.

Of the 123 million pounds of leaf produced in 1957, about 85 million pounds were classed as oriental and semioriental, about 27 million pounds as light air-cured, and 11 million pounds as dark air-cured.

Macedonia and part of Serbia are the main producing areas followed by the Bosnia and Herzegovina along the Adriatic. Croatia, Slovenia, and Montenegro are minor producing areas. Most of the oriental is produced in Macedonia and most of the semioriental is grown in Macedonia and Serbia. Prilep, which is grown chiefly in Macedonia and Thrace, is practically the only truly aromatic or oriental type produced in Yugoslavia. It is Basma type leaf and in 1957, production totaled about 30 million to 35 million pounds. The larger leaf types, Trebinjak, Ravnjak, Otlja, Herzegovina, and

TABLE 16.--Yugoslavia: Production and exports of all kinds of tobacco, average 1935-39 and 1945-49, annual 1950-57

Year	Production[1]	Exports[2]
	Million pounds	Million pounds
Average:		
1935-39	37.4	10.4
1945-49	62.2	18.4
Annual:		
1950	34.9	17.3
1951	61.3	13.8
1952	32.7	18.5
1953	65.2	13.5
1954	64.4	15.4
1955	91.4	32.3
1956	67.7	44.2
1957	122.8	35.4

[1]Farm sales weight. [2]Fermented weight.

others which are usually classed as semioriental accounted for an estimated 45 million to 50 million pounds in 1957. Some tobacco trade people think that Trebinjak was developed from the Trabizon type originally introduced from Turkey but the author has not been able to verify the accuracy of this. Although Herzegovina is usually classed as semioriental, it is sometimes known as Adriatic light air-cured. Some semioriental or Adriatic types are also produced along the Montenegran Coast and in the Istria Area of Croatia. The strong, large-leaf, dark air-cured types are produced mainly in Vojvoida but a small amount is grown in Slovenia.

Trade

Before World War II (1935-39) Yugoslavia exported an average of 10 million pounds of tobacco annually--mainly to Czechoslovakia, Poland, and France. Exports averaged a little above prewar, in the 1950-54 period but increased sharply in 1955 and in 1956, and were down some in 1957, but were still above 1955. Approximately 28 million pounds of the exports in 1957 were oriental and semi-oriental types. All of the exports in 1957 were fermented leaf, except 1.2 million pounds of unfermented tobacco taken by Italy. In the 1950-57 period 46 percent of total tobacco production was exported and the proportion of oriental exported was even higher.

In the past 3 or 4 years the major foreign customers have been France, the United States, Soviet Union, Poland, Italy, and Germany. Poland, Hungary, and Egypt have taken much larger amounts since 1954. It is reported by the tobacco trade that tobacco included in the Chinese Communist Trade Agreement in 1956 was actually delivered to Hungary.

In 1957, exports were reduced sharply to the Soviet Union, West Germany, France, and Hungary, but the United States took almost twice as much as in 1956. Virtually all the United States takings are the true oriental type of Prilep. Exports to Poland, Egypt, Czechoslovakia, and Austria in 1957 were above those of 1956, but total exports in 1957 were less than in 1956, mainly because the supplies available were down.

Yugoslavia imports significant quantities of leaf primarily from Turkey, but some of this is probably re-exported. Yugoslavia took more than 500,000 pounds of fermented leaf from Turkey in 1957.

Yugoslavian tobacco experts have indicated that they have about 66 million pounds of tobacco available for export in 1958, but that only about 45 million pounds may be sold to foreign countries because of increasing competition from Turkey, Greece, and Bulgaria.

Products

In 1957, Yugoslavia produced 39.4 million pounds of manufactured tobacco products--about 99 percent were cigarettes. Total using of leaf in 1957 were 9 percent above those in 1956.

TABLE 17.--Yugoslavia: Exports of unmanufactured tobacco, by country of destination, 5-year averages 1935-54, annual 1955-57

Country of destination	Average				1955	1956	1957
	1935-39	1940-44	1945-49	1950-54			
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
China, Mainland	--	--	--	--	--	[1]7.4	--
Poland	1.7	--	1.0	--	2.3	2.9	4.1
Czechoslovakia	7.4	2.2	2.1	(2)	2.2	.9	1.5
Egypt	.1	--	--	.2	(2)	.4	4.4
Germany	.5	2.1	.8	1.4	2.8	3.6	.9
France	.6	.8	2.1	5.8	9.5	8.2	6.8
Hungary	--	(2)	.2	--	--	2.9	1.1
Austria	--	--	.4	1.7	(2)	.4	.8
Belgium	--	--	.3	.5	.8	.5	.5
Italy	--	--	.4	2.0	2.5	2.9	[3]1.6
Netherlands	--	--	2.0	.5	.1	(2)	.1
Soviet Union	--	--	7.8	--	4.9	9.2	5.2
Algeria	--	--	--	.1	.2	.9	.7
Finland	--	--	.3	(2)	.1	(2)	.1
Sweden	--	--	(2)	.5	--	.3	.4
United States	--	--	.4	1.6	6.4	3.4	6.4
Other	--	.1	.2	[4]1.2	.5	1.2	.8
Total	10.3	5.2	18.0	15.5	32.3	45.1	[3]35.4

[1]Reported to have been delivered to Hungary. [2]Less than 50,000. [3]Includes 1.2 million pounds of unfermented leaf to Italy. [4]2.7 million pounds went to Denmark in 1951.

Rumania

Summary

Tobacco was introduced into Rumania by the Turks in the 17th century. The government monopoly has exercised supervision over the tobacco industry since 1889.

In 1940 Rumania lost about 40,000 square miles of territory which included important tobacco producing areas. It lost Bessarabia and Northern Bukovina to Russia, 17,370 square miles in Southern Transylvania to Hungary, and Southern Dobruga (area south of the Danube River) to Bulgaria. The Annexation of the eastern portion of this territory had a definite effect on tobacco acreage and production.

Estimates show that about 90 percent of Rumania's production is now oriental and semioriental type tobacco. Production of these types has increased greatly in the past 20 years while the total output of the dark air-cured type has remained practically the same.

Rumania imports and exports only relatively small amounts of tobacco.

Production

Production of tobacco has increased sharply in recent years, more than tripling since prewar. The acreage and production increased particularly after 1950 and by 1956 there were nearly 86,000 acres being cultivated to produce over 57 million pounds.

Rumania's tobacco cultivation is largely a small-scale type of farming. Following the harvesting and curing or drying the tobacco moves to the fermenting plants where it is sorted and fermented (under supervision of the monopoly).

TABLE 18.--Rumania: Acreage and production of tobacco, average 1934-38, annual 1948 and 1950-57

Year	Area	Amount
	Acres	Million pounds
Average:		
1934-38	25,946	18.1
Annual:		
1948	65,728	30.9
1950	71,906	30.0
1951	84,261	54.0
1952	82,284	32.4
1953	88,956	52.0
1954	78,084	42.5
1955	85,250	58.2
1956	85,744	57.3
1957	[1]99,334	[2]79.2

[1]Quarterly Statistical Bulletin No. 1-2, 1957. [2]Quarterly Statistical Bulletin No. 4, 1957.

Amuarul Statistic AL R.P.R.

Production by Type

It is difficult to classify Rumanian tobacco by types because the same tobacco appears in different areas under different or slightly different names.

Oriental - The Kerti Types--Yaka, Jaka, and Iaca have been grown in southern and southwestern Rumania. They are Turkish or Macedonian tobaccos and it is claimed that the seeds should be imported each year. These tobaccos seem to become coarser and degenerate under acclimatization. Some of the higher quality oriental leaf was produced in areas lost to other countries in the World War II period.

Semioriental - Ghimpati is a cross between an acclimatized variety of "Yaka" and local types. It is a much rougher plant than the parent, has a tall strong stalk and very large leaves with prominent veins. Molovata is a local name for Bessarabian and Soulouk. It is a small leaf tobacco, probably of Turkish (Macedonian) origin. It has been grown particularly in the low hill regions of Northeast Bessarabia and Southeast Moldovia. It is used mostly in the finer quality cigarettes.

Dragasina, an oriental or semioriental variety, appeared in 1943 or 1944 and had gained considerable acreage (2,000) by 1946.

Dark-air - Dark tobaccos are grown chiefly in the Western part of the country near the Hungarian and Yugoslavian borders, also on the Danube plains of Wallachia and Tiza plains of Transylvania. Debroçen is an important dark type and some of the most common varieties are Jalomitza (Yalomita) and Satmarean.

Satmarean is grown on the Tiza plains and does not have as wide a distribution as Jalomitza which is grown on the Danube plains of Wallachia, also to a limited extent in the areas of Transylvania.

Trade

Rumania's trade in leaf tobacco and tobacco products is not large. Current data on imports and exports of tobacco are not available.

With few exceptions (1936, 1943, and 1944) Rumania always imported more tobacco than it exported. It has imported tobacco from Turkey, Greece, Bulgaria, the United States, Italy, and Holland. In 1936, an exceptional year, imports totaled only 172,000 pounds while exports reached 2.6 million pounds. In 1943 and in 1944 imports were nil and exports were over a million pounds annually to the Soviet Union. These are the exceptions however, rather than the rule. Little data are available on tobacco trade for the period since 1945, however, incomplete data for 1956 are:

Imports from Turkey were 74,000 pounds, valued at $30,000, and imports from Greece were 20,000 pounds, valued at $22,000. Rumania's exports to the Free World were $146,000 of tobacco and tobacco products.

Products

Rumania generally uses more tobacco products than it produces and exports of manufactured tobacco products are unimportant. Tobacco products production figures are practically the same as consumption figures. According to information from secondary

TABLE 19.--Rumania: Production of tobacco, by types, average 1935-39 and 1947-51, annual 1952-57

Type	Average		1952	1953	1954	1955	1956	1957
	1935-39	1947-51						
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Dark air-cured	4	5	4	7	6	5	6	6
Oriental and semioriental	24	31	28	45	36	53	52	52
Total	28	36	32	52	42	58	58	58

TABLE 20.--Rumania: Imports and exports of unmanufactured tobacco, 1934-44

Year	Imports	Exports
	1,000 pounds	1,000 pounds
1934	229.1	163.3
1935	287.0	112.3
1936	171.8	2644.1
1937	638.1	194.7
1938	615.3	89.2
1939	537.9	155.6
1940	388.1	(1)
1941	209.5	(1)
1942	578.6	320.9
1943	(1)	1102.3
1944	(1)	1181.2

[1]Not available.

TABLE. 21--Rumania: Production of tobacco products, selected years, 1925-56

Year	Cigars	Cigarettes	Smoking Tobacco	Total
1925	347	8,434	26,153	34,934
1930	215	6,646	20,393	27,254
1935	165	6,080	18,115	24,360
1940	159	14,392	10,800	25,351
1948	(1)	(1)	(1)	23,647
1950	(1)	(1)	(1)	32,826
1955	(1)	(1)	(1)	40,293
1956	(1)	(1)	(1)	45,033

[1]Not available.

sources there has been a rapid upturn in the portion of total tobacco usings going into cigarettes.

Italy

Summary

Italy's production of oriental and semioriental tobacco has declined in the last 4 or 5 years.

The higher wage rates in Italy, making the costs of producing oriental tobacco higher than some of the other producing countries, are one of the main reasons for the decreasing production.

Italy imports oriental and semioriental tobacco including leaf from Turkey, Greece, Bulgaria, and Yugoslavia, exports oriental and semioriental tobacco from its own production, and re-exports some of the oriental purchased from other countries.

Cigarette production has increased steadily in Italy. Last year it used about 42 million pounds of oriental and semioriental leaf, about two-thirds of these usings were domestic oriental and semi-oriental and one-third were imported oriental.

Production

Italy is the seventh largest producer of oriental and semiori-ental. Production has declined slightly in recent years and imports have risen.

The main oriental types are Samsun and Trabizon from Turkey, and Xanthi from Greece. The major semioriental types are Herze-govina, Perustitza and Prosucian.

It seems likely that production of oriental leaf probably will con-tinue to decline (although semioriental may increase) unless it is subsidized. This is based on the belief that: (1) Italy's higher wage rates which increase production costs, will probably retard compe-tition with other oriental tobacco exporters; (2) The quality of Italian oriental does not appear to be good enough to create increasing for-eign demand for such leaf; (3) Italy may more profitably increase exports of the higher value products (particularly manufactured items) to the oriental producing countries in exchange for oriental leaf.

Exports

Italian sales of oriental to Eastern Europe are believed to be primarily the lower grade leaf in exchange for the higher quality oriental--especially Bulgarian--for use in Italian cigarettes. Much of the imports of oriental from the Soviet Union are believed to be re-exports of leaf from Bulgaria as well as from other areas, but very little reliable information is available on this aspect. On the

TABLE 22.--Italy: Production of unmanufactured tobacco, by types, 5-year averages 1935-49, annual 1950-57

Year	Oriental and semioriental	Other types	Total
	Million pounds	Million pounds	Million pounds
Average:			
1935-39	29.3	66.2	95.5
1940-44	([1])	([1])	86.0
1945-49	([1])	([1])	125.6
Annual:			
1950	45.3	128.1	173.4
1951	54.3	120.5	174.8
1952	41.2	119.8	161.0
1953	43.6	107.0	150.6
1954	40.6	100.3	140.9
1955	32.2	102.0	134.2
1956	35.5	108.2	143.7
1957	29.7	106.3	136.0

[1]Not available.

TABLE 23.--Italy: Exports of unmanufactured tobacco, by types, 5-year averages 1935-49, annual 1950-57[1]

Year	Oriental and semioriental	Other types	Total[2]
	Million pounds	Million pounds	Million pounds
Average:			
1935-39	(3)	(3)	12.9
1940-44	(3)	(3)	24.8
1945-49	(3)	(3)	5.2
Annual:			
1950	(3)	(3)	20.9
1951	(3)	(3)	17.2
1952	1.6	15.7	17.3
1953	5.6	21.8	27.4
1954	14.4	13.6	28.0
1955	5.5	19.7	25.2
1956	12.5	13.5	26.0
1957	4.2	20.1	24.3

[1]Excludes certain scrap and tobacco substitutes. [2]Includes some reexports of imported oriental leaf in certain years, especially since 1953. [3]Not available.

other hand, Italy also re-exports some oriental purchased from other countries.

Since 1952 exports of oriental and semioriental have ranged from about 2.0 million pounds to 14.4 million. Foreign shipments rose sharply in 1954, declined in 1955 and rose again in 1956. Preliminary data on the calendar year 1957 show exports and re-exports of oriental and semioriental to be very low compared with other recent years.

The USSR, United States, West Germany, the Netherlands, and Switzerland have been the largest importers.

Imports

Fairly large and increasing amounts of oriental are imported primarily from Turkey, Greece, Bulgaria, Yugoslavia, and in some years, from the Soviet Union. Some of the imports from the Soviet Union since World War II are believed to have been re-exports of leaf from Bulgaria.

In the prewar period (1935-39) Italy imported an average of 4.6 million pounds of oriental annually. Estimates of imports of oriental during World War II range from about 3 million to 9 million pounds per year. After a fairly stable level in the 1950-53 period, imports rose sharply in 1954 and have remained high since that time. Part of the amounts imported are re-exported but larger amounts of imported leaf are used to replace oriental formerly produced in Italy as domestic production declined. In 1957, the USSR took practically no tobacco from Italy compared with almost 7 million pounds in 1956. The United States had taken almost as much in the first 9 months of 1957 as in the full year of 1956. Switzerland's takings in 1957 were slightly less than half of the amount imported in calendar year 1956.

TABLE 24.--Italy: Imports (including re-exports) of unmanufactured tobacco, by types, 5-year averages 1935-49, annual 1950-57

Year	Oriental and semioriental	Other types	Total[1]
	Million pounds	Million pounds	Million pounds
Average:			
1935-39	4.6	0.7	5.3
1940-44	8.4	.2	8.6
1945-49[2]	9.3	4.0	13.3
Annual:			
1950	6.6	2.5	9.1
1951	5.5	.2	5.7
1952	4.3	--	4.3
1953	5.3	2.9	8.2
1954	14.3	1.6	15.9
1955	24.6	5.0	29.6
1956	13.9	1.8	15.7
1957	17.5	.2	17.7

[1]This includes significant quantities of imported oriental re-exported in some years, especially since 1953. Such re-exports are not reported in the official Italian import statistics. [2]In addition there have been very large imports of manufactured tobacco products (2.9 million pounds in 1945-46 and 14.9 million pounds in 1946-47).

TABLE 25.--Italy: Imports of oriental and semioriental tobacco, by country of origin, average 1940-44 and 1945-49, annual 1950-57

Year	Bulgaria	Greece	Yugoslavia	Turkey	USSR	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average:						
1940-44[1]	3.5	2.6	2.3	([2])	--	8.4
1945-49	.8	2.9	.4	1.7	0.3	6.1
Annual:						
1950	--	3.5	--	2.3	.8	6.6
1951	--	3.7	--	1.0	.8	5.5
1952	--	2.2	--	2.1	--	4.3
1953	--	--	--	3.1	2.2	5.3
1954	.6	7.4	3.3	1.4	1.4	[3]14.1
1955	5.8	8.9	2.5	7.4	--	24.6
1956	2.4	4.0	5.0	2.5	--	13.9
1957	1.8	9.2	1.6	4.9	--	17.5

[1]100,000 pounds in 1942-43. [2]Not available. [3]Includes 200,000 pounds from Hungary.

TABLE 26.--Italy: Production of cigarettes, average 1935-39 and 1947-51, annual 1951-55

Year	Cigarettes produced[1]
	Million pieces
Average:	
1935-39	16,993
1947-51	26,556
Annual:	
1951	32,423
1952	33,760
1953	37,243
1954	38,615
1955	40,096

[1]Estimated from tobacco used.

Products

Italy used 129 million pounds of tobacco in the manufacture of products in the fiscal year ending June 30, 1957. About 41 million pounds of this total was oriental. Of the 41 million pounds, 26 million were domestic oriental leaf and 15.5 million were imported oriental tobaccos.

The manufacture of cigarettes accounts for about 85 percent of the total poundage used.

Czechoslovakia

Summary

Czechoslovakia annually sows about 25,000 acres, which produce an average crop of about 24 million pounds of tobacco.

About 70 percent of Czechoslovakia's production is dark air-cured tobacco. It has been reported that the production of oriental, semioriental, and light air-cured types is increasing.

TABLE 27.--Czechoslovakia: Acreage, yield, and production of tobacco, 1950-56

Year	Area	Yield	Production
	1,000 acres	Pounds per acre	Million pounds
1950	12.9	1,052	13.6
1951	19.8	838	16.6
1952	24.6	838	20.6
1953	26.6	980	26.1
1954	25.3	976	24.7
1955	25.4	1,095	27.8
1956	24.3	936	22.8

Czechoslovakia, Statistical Yearbook, 1957.

TABLE 28.--Czechoslovakia: Production of tobacco, by types, average 1935-39 and 1947-51, annual 1952-57

Type	Average		1952[1]	1953	1954	1955	1956	1957
	1935-39	1947-51						
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Dark air-cured[2]	23	13	15	19	17	20	15	15
Light air-cured	2	1	1	1	1	1	1	1
Oriental, semioriental, other	6	4	4	6	6	7	6	4
Total	31	18	[3]20	26	24	28	22	20

[1]Breakdown by type approximations only. [2]Including small amounts of cigar tobacco. [3]Estimate, complete data unavailable.

Czechoslovakia does not as a rule produce enough tobacco for its needs and does not export any leaf, but imports 10 million to 12 million pounds per year for use in the manufacture of tobacco products.

Production

Czechoslovakia grows about two-thirds of the tobacco it consumes. Tobacco is grown in the Provinces of Bohemia and Moravia-Silesia; but the great bulk of the production is in Slovakia. Total acreage averaged about 14,000 during the 1947-49 period.

Trade

Czechoslovakia is chiefly a tobacco importing country and the only available record of substantial exports was in 1946 when shipments totaled 2.8 million pounds (to Bulgaria, Yugoslavia, and Turkey). Imports are mainly from Turkey, Greece, Bulgaria, and Yugoslavia, but there are trade reports that some Chinese flue-cured tobacco and small quantities of U.S. leaf, mainly cigar types, are imported. Czechoslovakia has a State Tobacco Monopoly which conducts all tobacco operations.

A typical breakdown by type or cross section view of Czechoslovakia is shown in imports for 1947. Imports totaled 21 million pounds, approximately 13 million pounds were oriental and semi-oriental, 4 million pounds, American cigarette type tobacco, 3.7 million pounds, American pipe tobacco, and 667,000 pounds, cigar wrapper tobacco. Data for a complete breakdown for a recent year are not available; however, in 1956 imports were approximately 12 million pounds of oriental.

Products

Cigarette production increased from 10.8 billion pieces in 1935 to 14.3 billion in 1950 and to 17.0 billion in 1952, then weakened slightly and was back to 17.5 billion pieces in 1956.

A million pounds of tobacco for roll-your-own cigarettes were produced in 1927, but this type of production has decreased slowly. Recent data are not available, but pipe tobacco consumption was 19.4 million pounds in 1923, dropped to 15.0 million pounds by 1937, and was down further to 4 million pounds in 1947.

TABLE 29.--Czechoslovakia: Production of cigarettes, average 1931-35 and 1947-51, annual 1952-56

Year	Production	Year	Production
	Bil. pieces		Bil. pieces
Average:		Annual: (cont.)	
1931-35.....	11.2	1953.....	16.2
1947-51.....	13.0	1954.....	13.9
Annual:		1955.....	16.1
1952.....	17.0	1956.....	17.5

United Nations Economic Survey of Europe, 1954.
Czechoslovakia, Statistical Yearbook, 1957.

The quantity of tobacco consumed in cigars has also been decreasing since 1921.

In 1947, there were only 7 tobacco manufacturing plants compared with 20 immediately before World War II. These 7 remaining plants were producing more cigarettes that year than 20 did during the prewar period.

Poland[1]

Summary

Poland produces about 80 percent of its tobacco needs. It is of interest primarily as an importer of oriental. Poland has had a tobacco monopoly since 1924 which handles all production of leaf as well as the manufacture and sale of tobacco products. Production of leaf tobacco in Poland has been rising sharply in recent years although the 1956 crop was reduced by unusually heavy rains and hail during the early part of September (in the Southeast where most of the cigarette tobacco is grown). Production has increased even though a large part of Eastern Poland including part of Southeast Poland, which was formerly a Polish oriental tobacco producing area, was taken by the Russians after World War II. Poland currently has been producing 3 million to 4 million pounds of oriental and semioriental tobacco annually.

Prices paid to tobacco farmers have been increased sharply recently and the expansion in leaf production is expected to continue.

Imports, since 1950, have ranged from 12 million to 26 million pounds of leaf per year. Nearly all of this is oriental from Turkey, Yugoslavia, and Bulgaria, although small amounts are imported from the China Mainland and other sources. Italy was an important supplier in 1949 and 1950. In some years, significant imports have been reported from the Soviet Union, but much of this is believed to have been grown in other countries, mainly Bulgaria and perhaps some from Hungary, China Mainland, and Italy. In 1957 there was a barter agreement with the China Mainland, which included tobacco. Tobacco Monopoly (Polish Tobacco Industries) officials indicated that only small quantities of leaf (probably about 120,000 pounds) were imported from the China Mainland in 1956, but no official data on imports by country of origin are available.

Cigarette production in Poland has recently been increasing at a rapid rate although this seemed to level off a little in 1957.

Production

Very little tobacco was produced in Poland prior to 1925. A major expansion was started about 1932 and production rose from about 16 million pounds (farm sales weight basis) in 1933 to about 30 million to 33 million in 1938 and 1939. Production of flue-cured types was started in 1933 and reached about 7.5 million pounds by the time Poland was invaded in World War II. No data are available on production in the World War II period, but output has

[1] In order to give the reader a better picture of the tobacco situation, this section was expanded to include more than oriental tobacco.

expanded since 1946. Production remained fairly constant but has risen sharply since that time to an alltime high in 1957. A drop in production in 1956 was caused primarily by unfavorable weather conditions.

There appears to be considerable research on various phases of production designed to improve the yield and quality of leaf, but the climatic and to a lesser extent, soil conditions of Poland are not conducive to producing high quality cigarette type tobaccos, especially flue-cured and Burley.

TABLE 30.--Poland: Estimated acreage and production of unmanufactured tobacco, 1933-57[1]

Year	Acreage	Production[2]
	Acres	Million pounds
1933	11,631	15.9
1934	10,438	14.7
1935	13,388	24.6
1936	14,574	23.8
1937	17,028	30.0
1938	19,513	32.2
1939	22,486	([3])
1945	16,449	([3])
1946	29,511	25.8
1947	29,284	38.7
1948	35,914	37.3
1949	34,278	39.7
1950	43,453	61.3
1951	50,836	68.4
1952	53,737	62.3
1953	53,164	68.2
1954	68,360	77.3
1955	79,957	102.3
1956	82,000	78.3
1957	75,860	115.7

[1]Data for 1940-44 not available. [2]Farm sales weight. [3]Not available.

TABLE 31.--Poland: Estimated tobacco acreage, by types, 1956

Type	Area
	Acres
Virginia (air- and flue-cured)	45,000
Mahorka (dark air Rustica)	12,500
Kentucky (fire-cured)	17,500
Other dark types (air-cured)	3,000
Oriental and semioriental	4,000
Burley	250
Total	82,250

The present system of fermentation on cigarette leaf is similar to that used on domestic tobaccos in Spain and France. The fermentation process used especially on the flue-cured and Burley, drastically changes the chemical and physical properties of the leaf. The cigarettes produced from these tobaccos do not have many of the characteristics of the blended cigarettes currently in demand by smokers in most countries of Western Europe.

Production by Types

Production of leaf tobacco began about 1919 and, with the exception of the 1939-46 period, has continued to expand.

The data on Virginia, Mahorka, and Kentucky fire-cured are believed to be fairly accurate, the remaining breakdown is subject to a wide margin of error. Mahorka production has expanded significantly. It requires only a 90-day growing period in Poland and can be grown in the North, and it is not as subject to the diseases which attack leaf grown in the Southeast.

Flue-cured in Poland is reported to require an average growing period of 120 days and Kentucky fire-cured 130 days. The growing season in the northern part of Poland is too short for production of these types.

The Polish Tobacco Monopoly has divided production of these into three main groups. They are:

Group I.	Trabizon	- large leaf oriental
	Tyk-Kulak	- oriental
	Herzegovina	- semioriental
	Zlotalistny	- semioriental
	Ihar	- (cross Virginia-Herzegovina)
	Virginia flue-cured	
	Havana (cigar)	
Group II.	Kentucky fire-cured	- Cross Kentucky and Hungarian cigar-type Pulawski Szerokolislny
	Moony-Staroniawski	- same as the French Variety Dragon-Vern which is a strong Kentucky type
Group III.	Mahorka - Nicotiana Rustica dark air-cured	

Practically all production except Mahorka is grown in the south and southeastern part of the country. Mahorka is grown almost entirely in the north, northeast, and northcentral areas.

The percentage of nicotine in Mahorka has reportedly been reduced from 4-6 percent prewar to 2-3 percent presently. Flue-cured, which is very neutral, is reported to have 1 percent or less nicotine.

Attempts to produce Samsun, and Smyrna have been unsuccessful.

The average annual yield per acre in the southeast (including flue-cured, Kentucky fire, and semioriental) is about 1,000 pounds per acre. Mahorka yields in the north central and northeastern regions are about 2,000 pounds per acre.

TABLE 32.--Poland: Estimated production, by types, selected years 1937-56[1]

Type	1937	1938	1955	1956
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Virginia (flue and air)	6,319	7,210	45,000	31,000
Mahorka (dark air)	11,875	9,538	26,000	26,000
Kentucky (fire-cured)	5,273	8,109	22,000	16,000
Other dark[2]	3,800	3,764	3,000	2,400
Oriental and semioriental	2,600	3,336	4,000	2,800
Burley	([3])	([3])	220	175
Total	29,975	32,120	100,220	78,375

[1]Farm sales weight. [2]In 1937-39 much of this was Hungarian (or Kerti) and there is still some, but the area in which it was formerly produced was taken by the U.S.S.R. after World War II (Southeast Poland). This is made up mainly of Pulawski Szerokolislny (a cross between Kentucky fire and Hungarian cigar) and Moony Stmroniowski. The latter is basically a French variety Dragon Vern (similar to Kentucky). [3]Probably very little produced.

About 80 percent of the total acreage of tobacco grown is in Southeast and the other 20 percent of the acreage in north, north central, and northeastern Poland.

The climate and soils of the Krakow area appear to be well suited to Kentucky fire-cured production, but diseases are bad. Soils are fairly heavy in this area, while in most of the other areas, where cigarette types are grown, the soils are mostly sandy to sandy loam.

Burley is hand-cropped or primed and is usually flue-cured rather than air-cured as in other countries. The Kentucky type is fire-cured and Mahorka and other dark types are air-cured. Oriental and semioriental are sun- or air-cured. In the Polish Tobacco Monopoly handbook, flue-cured Burley, Herzegovina, and Trabizon are the only major types that are classed as cigarette tobaccos. However, practically all of the Kentucky fire-cured and a significant proportion of the Mahorka are also used in cigarettes.

Fermentation Process

All Mahorka, Kentucky, and Virginia are fermented in special chambers (80-90 percent humidity at high temperatures for about 7 days). This process results in a substantial change in chemical properties of the leaf and after the treatment it appears to have very little oil and is not as pliable as it should be. Oriental, semioriental, and some of the Burley are not given this special fermentation treatment.

Exports

The U.S. tobacco trade reported 1957 Polish flue-cured exports totaling about 2.2 million pounds. Most went to Belgium with some finally being shipped to Egypt.

Imports

In the prewar (1935-39) period Poland imported an average of about 17 million pounds of leaf per year. The United States, Italy, Bulgaria, Yugoslavia, Greece, Turkey, and the USSR were the most important suppliers, but Brazil and Indonesia also supplied significant amounts. Since 1953 Poland's imports have ranged from 12 million to 26 million pounds annually and have been rising. Imports have averaged 23.7 million pounds annually since 1954.

In the last few years, Turkey, Yugoslavia, and Bulgaria have supplied most of the imports, but small quantities have also been imported from the China Mainland. For some time since World War II imports have been reported from the Soviet Union but most of this probably was produced in other countries; believed to be mostly from Bulgaria.

Turkey is the largest supplier. Imports of Turkish tobacco are mostly grades IV or V of the somewhat neutral Smyrna types and a little Marmara and Samsun.

No official data are available but imports from Bulgaria are estimated at 2 million to 4 million pounds annually. Bulgarian oriental tobacco is mostly the lower priced neutral leaf, the quality of which has been lowered even further by fast fermentation (high temperatures for 7-14 days).

The author did not observe any Chinese flue-cured in Poland, but he has evaluated it on other occasions--it is usually a bright color but is neutral cigarette filler without sufficient flavor and body.

Domestic leaf production is increasing, but it is not adequate. Poland will continue to need imports of cigarette tobacco. Both U.S. flue-cured and Burley are needed in limited quantities for blending in order to produce high-quality cigarettes.

Products

In 1957 approximately 95.4 million pounds of fermented leaf were used in the manufacture of tobacco products. About 99 percent of Poland's tobacco products are cigarettes, leaving only 1 percent for cigars, pipe tobacco, and snuff. There are seven factories and several fermentation plants. The fermentation plants are located in the producing areas or adjacent to the factories. Redrying plants are being installed. A program is aimed at installing one in each area handling cigarette-type leaf by 1961. Two were reported already installed by April 1957. Production of cigarettes has risen very sharply from prewar to an alltime high in 1957. Output of cigars rose to a postwar high in 1955, but declined in 1956 and further in 1957. Production of pipe tobacco in 1957 was about the same as that in 1955 and 1956 and approximately 10 percent above that in the 1950-54 period. Less than a million pounds of cut tobacco was sold in 1957 compared with 26.8 million pounds prewar (1934-38). Very small amounts of chewing tobacco and snuff are produced.

Types of Cigarettes Produced

The brands which account for the bulk of production appear to be composed mainly of a mixture of flue-cured, Burley, Kentucky

TABLE 33.--Poland: Estimated imports of unmanufactured tobacco, by country of origin, 1935-57[1]

Year	Italy	Brazil	Indonesia	Greece	Turkey	United States	Yugoslavia	Bulgaria	USSR	All others	Total
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1935.....	4,934	297	531	1,102	264	4,773	2,754	1,375	2,076	22	18,128
1936.....	1,616	254	240	970	453	4,909	2,301	2,333	1,131	30	14,237
1937.....	4,022	36	1,316	2,097	2,116	4,508	--	3,800	119	128	18,142
1938.....	4,944	333	433	2,971	2,342	2,991	3,661	4,520	888	36	23,119
1939.....	--	--	--	844	1,530	598	--	8,439	900	110	12,421
1946.....	--	--	--	(2)	--	--	882	621	3,796	--	5,299
1947.....	--	--	--	(2)	--	--	1,259	(3)	[4]6,889	--	8,148
1948.....	--	--	--	(2)	--	--	2,743	(3)	[4]3,844	--	6,587
1949.....	1,086	--	--	(2)	2,234	--	1,117	(3)	[4]4,307	--	8,744
1950.....	4,683	--	--	(2)	1,423	--	--	(3)	(3)	(3)	22,100
1951.....	--	--	--	(2)	44	--	--	(3)	(3)	(3)	15,500
1952.....	151	--	--	(2)	178	--	--	(3)	(3)	(3)	15,600
1953.....	--	--	--	(2)	--	--	--	(3)	(3)	(3)	12,000
1954.....	--	--	--	(2)	4,773	--	--	(3)	(3)	(3)	16,200
1955.....	--	--	--	551	13,720	--	2,315	(3)	(3)	(3)	26,100
1956.....	--	--	--	552	8,634	--	2,944	(3)	(3)	(3)	22,500
1957.....	--	--	--	(2)	11,508	--	4,071	(3)	(3)	(3)	22,700

[1]Data from exporting countries since World War II. No data available for 1940-45. [2]None shown separately. [3]Not available. [4]Believed to be mostly Bulgarian leaf with perhaps some from Hungary and other countries.

TABLE 34.--Poland: Production of tobacco products, by types, average 1934-38, annual 1946-57[1]

Year	Cigarettes	Cigars	Cut tobacco	Estimated total tobacco used in manufacture of tobacco products[2]
	Million pieces	1,000 pieces	1,000 pounds	Million pounds
Average:				
1934-38.....	6,845	30,195	26,763	40.3
Annual:				
1946.....	5,427	18,474	343	13.5
1947.....	10,026	25,987	873	23.8
1948.....	15,137	16,533	([3])	34.8
1949.....	21,286	([3])	([3])	48.4
1950.....	25,265	23,124	827	57.2
1951.....	29,688	26,560	823	67.0
1952.....	30,359	26,107	724	68.4
1953.....	32,478	25,354	786	73.1
1954.....	32,517	25,144	903	73.3
1955.....	37,468	28,493	896	84.2
1956.....	41,279	27,825	885	92.6
1957.....	42,779	27,268	893	95.9

[1]Small amounts of snuff and chewing tobacco are produced but separate data are not available. [2]Fermented weight. [3]Not available.

fire-cured, 5 to 15 percent oriental and semioriental, and small amounts of Mahorka and other dark leaf.

There are a few brands of cigarettes which are made up of about 60-70 percent oriental and the remainder flue-cured and semioriental, but these account for only a small proportion of total production. One or two brands appear to contain about 12 percent Mahorka, 5 or 6 percent oriental, and the remainder Kentucky fire-cured and flue-cured. Most of the Mahorka is used in one low-priced brand.

Hungary

Summary

Hungary annually produces about 40 million to 60 million pounds of tobacco on about 55,000 acres.

Production is divided approximately as follows: oriental and semioriental, 35 percent; flue-cured, 17 percent; light air-cured, 13 percent and dark air-cured, 35 percent.

The greater part of production of oriental and semioriental is semioriental.

Hungary exported an average of about 20 million pounds of tobacco in the prewar years (1935-39). Currently only a few million pounds are believed to be exported each year.

Hungarian leaf imports probably average between 2 million and 7 million pounds per year.

It is reported that Hungary received 7 million pounds of Chinese flue-cured in 1957 that had been originally included in a Yugoslav-Chinese Communist trade agreement.

Production

Hungary planted an average of 55,000 acres of tobacco, which produced 49 million pounds annually in the 1950-56 period. Production is reported to be about one-third oriental and semioriental (mostly semioriental), 17 percent flue-cured, some of which is semioriental types, 13 percent light air-cured (about half of which is Maryland that is grown mostly in the Hajdu and Bekes area) and the balance or 35 percent dark air-cured. About 5 percent of production is oriental (mainly from Djebel Basma seed introduced from Bulgaria) and is grown in the Heves area, especially in the Barlitone Lake District. Semioriental makes up about 25 percent of production and is composed mainly of Szabolcsi or Szaboly (some of which is flue-cured) and Hevesi. Szabolcsi accounts for about 19 percent of total production and Hevesi about 6 percent. Muscat or Muscotaly type tobacco, often indicated as semioriental, is normally a pipe tobacco and is relatively unimportant.

Szulok is a minor cigar type. There are miscellaneous minor types such as Rosa which resembles red Burley and Szegad used in pipes. These usually are classed as dark air-cured types, but

TABLE 35.--Hungary: Types of dark tobacco grown and percentage of total production

Type	Percentage of total
Debreceni	17
Tiza	6
Kerti (Garden)	8
Sumatran	2
Other	2

TABLE 36.--Hungary: Leaf production, 5-year averages 1935-49, annual 1950-56

Year	Area	Production
Average:	1,000 acres	Million pounds
1935-39	37.0	45.9
1940-44	44.8	45.2
1945-49	39.8	38.3
Annual:		
1950	52.6	45.2
1951	56.5	59.9
1952	59.6	36.5
1953	63.1	52.4
1954	42.1	38.4
1955	48.1	49.8
1956	54.3	62.0

little is actually known about their characteristics or how much is produced.

Flue-cured, which was first introduced in 1938, is of good bright color but lacks aroma and flavor. A considerable amount of the flue-cured tobacco grown in Hungary has been hauled green to central drying or curing stations. By this method it probably has been cured more uniformly than it would have been if it were cured by the individual growers who have had little experience with flue-cured tobacco. Current accurate data are not available on the extent of flue-cured production.

Exports

In the prewar period (1935-39) Hungary exported an average of 20.2 million pounds of leaf. The most important importers were France, Austria, Belgium, Germany, and the Netherlands. In the 1940-44 period practically all of the surplus, especially of the light tobaccos was taken by the Germans. Significant amounts of dark leaf were imported by France, Denmark, and perhaps other areas of Western Europe.

In the 1945-49 period, the Soviet Union took substantial quantities of Hungarian leaf, mostly Debreceni and flue-cured.

In the 1950-54 period France took an average of about 1 million pounds annually. Small quantities in recent years have been taken by Switzerland and the Netherlands.

Hungary imports some higher quality oriental leaf, mainly from Bulgaria with lesser amounts from Turkey and Greece. It is estimated that an average of 2 million to 4 million pounds of Bulgarian leaf are imported annually.

TABLE 37.--Hungary: Exports of unmanufactured tobacco, by country of destination, average 1935-39 and 1940-43, annual 1947 and 1948

Country of destination	Average		1947	1948
	1935-39	1940-43		
	Million pounds	Million pounds	Million pounds	Million pounds
France	5.3	3.7	--	--
Germany	4.1	15.4	--	--
Netherlands	1.6	1.0	0.7	0.3
Belgium	2.3	1.0	--	--
Austria	3.9	--	--	--
Switzerland	1.0	1.0	--	--
Algeria	1.0	--	--	--
Soviet Union	--	--	--	2.9
Other	1.0	--	([1])	[2] .7
Total	20.2	22.1	.7	3.9

[1]Less than 100,000 pounds. [2]Tunis.

TABLE 38.--Hungary: Imports of unmanufactured tobacco, by country of origin, average 1935-39 and 1940-43, annual 1947 and 1957

Country of origin	Average		1947	1957
	1935-39	1940-43		
	Million pounds	Million pounds	Million pounds	Million pounds
Bulgaria	1.4	2.1	.2	(1)
Greece	1.0	(1)	(1)	3.4
Turkey	1.0	1.0	.1	(1)
Italy	1.0	1.0	(1)	(1)
Yugoslavia	(1)	1.0	(1)	1.1
Other[2]	(1)	1.5	.6	(1)
Total	4.4	6.6	.9	(1)

[1]Not available. [2]Hungary received 3 million-4 million pounds of leaf from Algeria during 1952-55.

TABLE 39.--Hungary: Production of manufactured tobacco products, 1938-56[1]

Year	Cigars	Cigarettes	Cut cigarette tobacco	Pipe tobacco
	Million pieces	Million pieces	1,000 pounds	1,000 pounds
1938[2]	44.0	2.3	6.3	9.8
1939[2]	56.0	2.8	5.0	10.6
1940[2]	74.0	3.3	8.5	11.8
1941	63.0	5.4	9.5	15.3
1942	87.0	7.4	10.3	15.1
1943	98.0	7.5	11.5	14.0
1947[2]	11.0	4.1	(3)	2.2
1948[2]	(3)	6.8	(3)	(3)
1949	(3)	6.3	(3)	(3)
1950	24.7	6.3	(3)	6.0
1951	35.6	8.5	(3)	6.9
1952	48.4	10.4	(3)	6.4
1953	48.0	11.2	(3)	5.6
1954	56.3	12.7	(3)	4.9
1955	56.9	13.5	(3)	5.0
1956	(3)	12.2	(3)	(3)

[1]No data available for 1944, 1945, and 1946. [2]Fiscal year. [3]Not available.

Manufactured Products

Hungary has a tobacco monopoly that was first created in 1867 which controls production, manufacturing, and distributing products. Cigarettes and pipe tobacco are the main products. Pipe smoking is chiefly a rural habit. During and immediately after World War II large quantities of cut cigarette tobacco for roll-your-own cigarettes were sold.

Eastern Zone of Germany[2]

Summary

The Eastern Zone of Germany, which has a population of approximately 18 million people, is now importing from 55 million to 60 million pounds of leaf annually. The recent trend is toward declining domestic leaf production and increasing imports of leaf and of cigarettes. The increased imports have been mainly in the light cigarette types of oriental and flue-cured. There has been a sharp decline in domestic production and use of the dark tobacco types. A reunification of Germany would probably bring about a shift to a higher proportion of flue-cured and Burley and a smaller percentage of oriental in cigarettes.

Production

Tobacco is grown mostly by individual farmers in small acreages or plots, however, some tobacco is grown on "socialist" or collective-type farms. Leaf production reportedly reached a high in 1951 but declined sharply, in 1956. Unfavorable weather was responsible for the reduced yields in 1956. The recent reduction in tobacco acreage was probably caused by greater emphasis on food and feed crops, the low quality of cigarette tobacco produced, and the desire to export more manufactured goods (especially machines) in exchange for imports of tobacco.

TABLE 40.--Germany, Eastern Zone: Acreage, yield, and production of tobacco, 1950-56

Year	Acreage	Yield	Production
	Acres	Pounds per acre	Million pounds
1950	21,251	1,017	21.6
1951	22,980	1,238	28.4
1952	20,509	1,021	20.9
1953	10,872	([1])	([1])
1954	10,626	1,100	11.7
1955	10,872	1,115	12.1
1956	9,884	691	6.8

[1]Not available.

[2] The Zone of Germany occupied by the Soviet Union.

Tobacco growing, like the production of most other items in East Germany, is determined chiefly by the Eastern Zone planners. Six government-owned and -operated organizations are responsible for putting the tobacco growing program into effect. Contracts drafted by these organizations fix the acreage and stipulate a minimum delivery quota. If a farmer does not want to enter into a contract, the delivery quota is made compulsory. The state organizations supply the tobacco seed and supervise and instruct the farmers in cultivation practices. They also purchase the crop at government-fixed prices and process the leaf.

The domestic leaf production has been mostly dark types; mainly cigar and pipe varieties, which also have been used in cigarettes. In addition to cigar leaf, a type of tobacco which is called "Wohlsdorfer Burley" is reported as being flue-cured.

Trade

For the past 2 or 3 years, the Eastern Zone of Germany has depended on imports for over three-fourths of its leaf usings. Imports of leaf rose from 21.6 million pounds in 1951 to 57.2 million in 1956. From the data available, it appears that Turkey is the largest and Bulgaria the second largest supplier of oriental leaf. Actual imports of Bulgarian leaf including transshipments or re-exports from other countries are estimated as somewhat above data shown in the table. Most of the Eastern Zone's flue-cured imports come from Communist China, but some Indian flue-cured imports are also reported. Some U.S. leaf is taken, but the exact amount is not known. In the first nine months of 1957, East Germany imported about 365,000 pounds of Kentucky fire-cured from Italy. A West German Trade Journal reported Syria would ship the Eastern Zone a small amount of tobacco in 1958. Imports of leaf tobacco are handled by a state organization "Deutsche Genussmittel G. mb.H." which is

TABLE 41.--Germany, Eastern Zone: Estimated imports of tobacco, by country of origin, average 1953-54, annual 1955-57

Country of origin	Average 1953-54	1955	1956	1957
	Million pounds	Million pounds	Million pounds	Million pounds
Turkey	5.8	11.3	14.0	21.8
Greece	5.3	2.5	1.7	1.8
Bulgaria[1]	3.5	5.6	6.0	([2])
Yugoslavia	--	.9	.3	([2])
Other	[3]28.1	[3]26.7	[3]35.2	([2])
Total	42.7	47.0	57.2	([2])

[1]Trade sources indicate that in addition to direct shipments from Bulgaria, significant quantities of Bulgarian leaf are imported through transshipments or re-exports from other countries. [2]Not available. [3]Believed to be mostly from Communist China but reliable data are not available on imports of tobacco from some Iron Curtain countries, nor are complete data available on the re-exports and transshipments from certain areas to East Germany.

TABLE 42.--Germany, Eastern Zone: Imports of unmanufactured tobacco and cigarettes, 1951-56

Year	Leaf tobacco	Cigarettes
	Million pounds	Pieces
1951	21.6	(1)
1952	38.7	(1)
1953	41.6	178
1954	44.2	620
1955	47.9	932
1956	57.2	928

[1]Not available.
Official East German statistics.

supervised by the "Deutsche Inner-Und Aussenhandel (Dia)," an agency of the Eastern Zone Ministry of Domestic and Foreign Trade.

Some cigar leaf moves from the Eastern Zone to the Western Zone. It is reported that in 1955, 60,000 pounds of cigar leaf, and in 1956, 1.4 million pounds moved to the Western Zone. In 1955 about 315,000 pounds and in 1956 about 990,000 pounds of dark tobaccos (mostly Brazilian and Dominican Republic cigar leaf and Kentucky fire-cured) reportedly were transshipped through Western to Eastern Germany.

The Eastern Zone reportedly has trade agreements or arrangements for importing tobacco and tobacco products from Albania, Bulgaria, Hungary, Rumania, Soviet Union, and Syria. They may also have similar arrangements with Poland, Czechoslovakia, Yugoslavia, and other areas.

Cigarette imports have recently risen sharply. About 930 million pieces were imported annually in 1955 and 1956. The main suppliers were the Soviet Union and Bulgaria. Poland, Hungary Czechoslovakia, and Communist China provided small amounts.

TABLE 43.--Germany, Eastern Zone: Estimated production of manufactured tobacco products, 1950-56

Year	Cigarettes	Cigars and cigarillos	Smoking tobacco
	Billion pieces	Million pieces	Million pounds
1950	9.88	391	4.99
1951	11.75	433	6.48
1952	14.14	570	5.52
1953	17.29	662	5.09
1954	17.00	620	6.30
1955	17.81	713	6.74
1956	17.47	839	7.41

Official East German statistics.

Products

Tobacco processing in the Eastern Zone is subject to strict government controls. Production of cigarettes in 1956 was estimated at about 17.5 billion pieces using 41.8 million pounds of leaf; 938 million cigars, using 11 million pounds of leaf; and a substantial amount of smoking tobacco, using about 7 million pounds of leaf.

Syria

Syrian production has averaged about 11.5 million pounds annually during the past 10 years. Most of the production is oriental but small amounts of semioriental and other types, such as Tombac, Hasan Kayf, Burley, flue-cured, and others are also grown. The main oriental types are Abu Riha (father of aroma), Shak-al-Bent (stringing by a girl), Baffra and Samsun (latter two Turkish). The well-known Latakia is fire-cured leaf produced from Abu Riha seed. There has recently been an expansion in production of Prilep oriental and Ravnjak semioriental introduced from Yugoslavia as well as the semioriental type Frinsawi (Kasab). Production of Latakia has declined in recent years because demand by the United States, which took most of this leaf, has dropped very sharply. France, Italy, and Sweden have been among the more important of the many smaller buyers of Latakia.

Exports of unmanufactured tobacco exclusive of Tombac, averaged about 5.5 million pounds annually in the 1949-52 period, but declined sharply after 1952. Exports dropped to 2.6 million pounds in 1953, rose slightly to 2.8 million in 1954, then continued the decline to 1.5 million pounds in 1955, and 1.4 million in 1956. Approximately 80 percent of exports in the 1949-56 period were to the United States and the rapid decline in total exports was caused by a drop in sales to the United States. Exports of Tombac have increased sharply since 1950, but in 1955 and 1956 they were down to well below the 1951-54 levels. Tombac is taken mostly by Libya, Egypt, and Lebanon.

The Soviet Union probably will take increasing quantities of Syrian leaf (both for propaganda and economic purposes) because of the recent policy shifts in this area.

Leaf imports have ranged from 500,000 pounds to 1.7 million pounds in recent years. Most of these were oriental from Turkey, Greece, and Libya; and Tombac from Iran, although there were large imports of cigarette leaf from Japan in 1954 and 1955.

Pakistan

Pakistan produces 10 million to 12 million pounds of semioriental tobacco. This is about 5 percent of total tobacco production. Much of this semioriental leaf is used domestically and has little effect on world trade. Among the buyers of Pakistan's tobacco (all types) are the Netherlands, Portuguese Indies, Ceylon, Denmark, the United Kingdom, and the Indian Republic.

Pakistan imported 877,000 pounds of leaf in 1957, most of it flue-cured from the United States. It also imports approximately

8 million to 9 million pounds of bidi tobacco each year. It imported only 8,517 pounds of manufactured tobacco products in 1957.

In 1957, Pakistan manufactured about 6.2 billion cigarettes (pieces) and 1.5 million cigars.

Iran

Iran's production plays only a small part in world tobacco trade. It is largely of the oriental and semioriental type. In most years Iran's production of this type of leaf is used domestically. In each of the past two years (1956 and 1957) Iran produced about 31.6 million pounds of leaf, of which 24.5 million pounds or almost 80 percent was oriental. The main oriental types are Trabizon and Samsun from Turkey, Basma from Greece, and Tyk-Kulak (Di Koulak or Tykulak) from the Soviet Union. Tombac and small amounts of flue-cured and Sumatran cigar are also grown.

As a rule Iran's exports are less than a million pounds. The recent exception was the 1954-55 marketing year when it exported 2.7 million pounds. In the 1951-52 marketing year, Iran exported 15.7 million pounds, mostly to the USSR. This may have been to reduce surplus stocks.

The USSR has been Iran's biggest customer, but only in the 1951-52 marketing year. Liberia, Germany, Spain, Hungary and the Netherlands take relatively small amounts, but buy more frequently.

From 300,000 to 800,000 pounds of Tombac are exported annually mostly to Lebanon, Egypt, and Oman, but limited amounts are shipped to the Soviet Union, the Netherlands, and other countries.

Lebanon

Production of leaf in 1957 was about 8.4 million pounds, an all-time high, rising from 5.5 million in 1954 and 1955 and an average of 4 million pounds in the 1949-54 period. Most of the leaf is oriental varieties from Bulgaria and Turkey--Samsun, Baffra and Izmir (Muushi)--as well as some Shak-al-Bent, Jubail-Bent, Jazine. Small quantities of Tombac are also grown.

Since 1950, exports of leaf (mostly Tombac) have ranged from about 691,000 to 1 million pounds. Most of the exports usually go to Egypt and Syria, but significant amounts have been taken in some years by France. In 1956 the Soviet Union was the largest importer and in 1957 the United States took about two-thirds of total exports.

In the period 1950-55, imports ranged from 382,000 to 434,000 pounds of leaf exclusive of Tombac. In these years, imports of Tombac ranged from 104,000 to 550,000 pounds mostly from Iran and Syria. There are some imports of oriental from Turkey, Greece, and Syria.

Iraq

Iraq produces an average of about 12 million pounds of tobacco--about 4.7 million pounds oriental leaf, approximately 4.8 million pounds flue-cured, and 2.4 million pounds Burley. The Sulaimaniyah is the most important producing area. About 45 percent of the

oriental is Tikelak, (Tyk-Kulak) 30 percent is Trabizon, 22 percent Basma and 3 percent Samsun. Iraq's production has little effect on the world market.

Other Producing Countries

Union of South Africa

The Union of South Africa produces from 800,000 to 1 million pounds of oriental. Most of it is grown in the Stellenbosch District of the Cape of Good Hope Province and is used almost entirely in the domestic manufacture of cigarettes.

Federation of Rhodesia and Nyasaland

Federation of Rhodesia and Nyasaland has produced some oriental tobacco for several years largely on an exploratory basis. It exported about 200,000 pounds of leaf in 1954 and about the same in 1955. In 1956, exports of oriental leaf dropped to 100,000 pounds. Production for 1958 has been estimated at 1.6 million pounds.

Libya

Libya produces approximately 3 million pounds of tobacco--about 650,000 pounds oriental. It is chiefly the Perustitza type which probably was introduced from Bulgaria. This leaf is practically all used domestically.

Cyprus

Cyprus produces 1.1 million to 1.8 million pounds of tobacco each year, mostly yellow leaf fumigated. Production of oriental leaf (Latakia) never was large and is decreasing (less than 70,000 pounds in 1956). It imports about 1 million pounds of leaf plus about 10,000 pounds of Tombeki annually. It imported 1.2 million pounds of cigarettes in the first 11 months of 1957, mostly from the United Kingdom, and 4,000 pounds of cheroots.

Glossary of Terms Used With Oriental Tobaccos

As Turkey and Greece were the first major producers and exporters of oriental type tobaccos, many Turkish and Greek terms are associated with oriental tobacco in other areas. Most of these are Turkish because production and exports became widespread during the period of the Turkish or Ottoman Empire.

Place Names

Oriental tobacco is usually known by the name of the village, town, or region in which it is grown. If it is a large and old producing region, the name is frequently used to refer to a general type of leaf or a large class grouping, such as Smyrna, Samsun, Trabizon, or Xanthi. If the name refers to a smaller or newer producing region, the tobacco trade considers the local name as a subtype, or variety, of the type name of the larger or older producing area from which the seed were introduced. Examples of the names considered as subtypes or varieties include:

Katerini (Greece) tobacco is a subtype of Samsun, introduced from the Samsun area of Turkey.

Stanimaka (now Asenovgrad, Bulgaria) tobacco is a subtype of Basma, introduced from around the Xanthi area of Greece.

Sukhumi (U.S.S.R.) tobacco is a subtype or variety of Samsun, introduced from Samsun, Turkey.

Sochi (U.S.S.R.) tobacco is a subtype or variety of Trabizon, which is Kaba Koulak introduced from Trabizon, Turkey.

Crimean (U.S.S.R.) is a subtype of a variety of tobacco introduced from Xanthi, Greece.

Prilep (Yugoslavia) tobacco is a subtype of Basma, introduced from the area around Xanthi, Greece.

General Types and Major Categories

(1) The term Kaba (or Caba)-Kulak (or Koulak)--Turkish meaning "thick ear"--is associated with tobacco having a semipetiolate leaf stem where it is attached to the stalk. The leaves of many types, such as Trabizon, Sari, Marva of Thessaly, Marva of Argos, Kuban Maikop, and Georgia, can be described as having a rudimentary short, thick stem associated with the meaning of Kaba-Kulak.

(2) Tek (Tyk, Tik, or Di in other nearby languages)-Kulak is a Turkish term meaning "single ear." The words Tek-Kulak, like the term Bashi-Bagli, are frequently used to describe leaves that have a pronounced petiole or stem between the broad portion of the leaf and the place where it joins the stalk. The leaves of many types—Samsun, Xanthi, Prilep, and Prosochani—can be considered as having the characteristics associated with slender petiole or Tek-Kulak shape. Both Kaba-Kulak and Tek-Kulak are used to describe certain characteristics of the leaf, particularly the shape at the base or near the base where it joins the stalk.

These terms are often used as a basis for describing or classifying tobaccos by categories, such as types or subtypes, and are sometimes incorrectly used as type or variety names. They may

or may not indicate genetic characteristics which should serve as a basis for classification as to varieties. However, regardless of whether or not these characteristics are adequate for establishing specific varieties or groupings, they are used by the producers and tobacco trade in the oriental-producing areas to describe the differences in the tobaccos grown in various areas. Consequently, they are general descriptive terms which properly should be used to describe any of several types which have similar characteristics within the original meaning of the words.

(3) Basma is a Greek word used to describe a very thin, fine type of cloth or head scarf. The name is used by the trade to apply to the thin fine-veined type of tobacco leaf produced from seed in the Macedonia-Thrace area.

Some authors say the term Basma, as used in relation to tobacco, referred to the method of packing the tobacco whereby all of the leaves are placed in the same direction so that the rows fit very smoothly together in a bale-like cloth folded around a bolt. Others say the term originated from the Turkish word "basmask," meaning press or compress. Whatever the original meaning of the term was, the word Basma is now used to describe the kind or type of oriental tobacco which has certain specific characteristics resulting from influences of the soil and climatic conditions of the Macedonia-Thrace area. The term Basma is also used to denote a sessile-type leaf, with practically no narrow stem, as well as a thin, small leaf, with fine veins and highly aromatic.

Certain types of Basma, such as Yalta, Crimean (U.S.S.R.), and Gumushladjikoy (Turkey), are considered as tailless or without a stem, but the term Basma has a broader meaning of high quality; and it includes types that have other than the sessile leaf form, such as Samsun, Xanthi, Prilep, and others.

(4) Bashi-Bagli--Turkish meaning "tied head"—originally applied to the way leaves were roughly tied together by the heads when packed. The term is now used as a general description for several separate types which have certain similar leaf characteristics, mainly as related to the shape of the leaf stem. The terms Bashi-Bagli or Kulaksis both mean that the leaf has the petiole or pronounced stem, narrow or slender, near or in the vicinity of where the leaf stem joins the stalk. Bashi-Bagli now seems to have the additional connotation of referring to leaves of a certain size, with a very mild aroma. The petiolate leaf stem is characteristic of Samsun, Sukhumi, Sochi, and several other types.

(5) Smyrna is a type of oriental tobacco which has a medium-sized leaf, mildly aromatic, which is grown from seed introduced from the Smyrna (now Izmir) area of Turkey.

(6) Samsun (also Sampsun) is Basma type tobacco with a very small leaf that is very aromatic. It is grown from seed introduced from the Samsun region along the Black Sea area of Turkey.

(7) Trabizon (also Trebizond, Trebizonde, Trabzon) is a very large type of leaf tobacco, which does not appear to be an aromatic type and perhaps should be classed as semi-oriental. It is grown from seed introduced from the Trabizon area of Turkey.

(8) Saria is the Turkish word for yellow, but Saria is now used to mean a specific subtype of tobacco produced in Greece. This group has a large, thin, yellow leaf, is neutral in aroma, and appears to be a Kaba-Kulak type.

(9) Marva is the Greek word for black, and it is now used to denote one of several dark varieties or types of Kaba-Kulak grown in a few areas of Greece.

(10) There are many other names of villages or regions by which oriental tobaccos are known, but these are not included in this category as they represent relatively new producing areas or types of lesser importance.

Quality in Relation to Elevation or Topography of the Producing Area

Elevation or slope of the producing area is an important factor in determining the aromatic properties of the leaf. The most commonly used terms in this connection are the three following Turkish words which may apply to tobaccos produced at various elevations:

(a) Djebel—mountains or highland areas.

(b) Yaka (also Jaka in nearby languages)—hillsides or slopes.

(c) Ova—lowlands or level areas.

These terms are often used as the names or to describe the tobacco produced in a particular area. This is so prevalent that persons who are not tobacco specialists may think that these names indicate separate varieties.

Baling or Packing

In addition to the terms Bashi-Bagli and Basma, there are many other words which refer to packing or baling.

(1) Sira-basteli--leaves placed in the same manner as Basma but with the leaves being placed more unevenly than in the case of Basma.

(2) Armathodemata--a Greek word which refers to a type of bale in which the tip ends of alternate rows of leaves point in one direction, with the stem or stalk end of the leaves in the other rows pointing in the opposite direction.

(3) Dizi-Delgi is the Turkish word used to describe the packing or bales that are made up of successive rows of leaves each piled with the tip ends all placed in the same direction. The words Dizi, Desi, or Disi—meaning the way the leaves are placed on a string—are used in certain parts of Turkey, Hungary, Pakistan, India, and other areas to refer to a certain subtype of oriental that was probably originally handled in this manner.

(4) Pasteli—a Greek word meaning "stacked on each other"—is used to describe a type of bale with the stem or stalk ends of the leaves pointing toward the outside of bale and the tip ends of the leaves pointing toward the inside.

(5) Kalup is a Turkish word meaning "cup" and refers to a method of packing originally used near Smyrna, Turkey.

(6) Tonga--a commercial bale in which the leaves are placed in any direction in the box and pressed.

Pickings or Cropping

In Greece, Turkey, and nearby producing areas the term hand, or first, second, third, fourth, fifth, or sixth hand, refers primarily

to the leaves from certain positions on the stalk. The first hand is the first picking from the bottom of the stalk, with the second, third, and so on, being leaves taken from farther up or nearer the top of the stalk. To the tobacco merchant the term hand has the additional connotation of quality, particularly the aromatic properties associated with position of leaves on the stalk. To the merchant the first or second hand would connote neutral leaf, with the fourth, fifth, or sixth hands meaning leaf with more aroma.

Manipulation

This term refers to the processing of leaf after it has been delivered either in strings or farm bales from the farm to the buyer. This operation includes sorting the leaves and mixing them to make the bales uniform in the quality desired by the buyer. The leaf is then baled and is normally stored in warehouses in the producing country. While in storage the bales are turned periodically while the leaf undergoes at least one fermentation before it is exported or stored for a longer period prior to being used.

Suggested Classification

More work needs to be done on oriental classification. A set of criteria should be developed or agreed to for use throughout the oriental-producing areas as a basis for differentiating the tobaccos into separate categories, such as types, subtypes, and varieties.

It seems appropriate to consider the term oriental or aromatic as a kind of tobacco which includes a comprehensive category of several types with the term oriental being comparable to the terms flue-cured, burley, and so forth.

Because of their importances, Smyrna, Samsun, Trabizon, and so forth should be considered as major types of oriental. The newer producing areas or those in which production is small might be considered as subtypes or varieties if the characteristics of leaf in the particular areas differ significantly from those of the same type produced in other areas. For example, Katerini tobacco produced in Katerini, Greece, might be regarded as either a subtype or variety of Samsun as the seeds were introduced from Samsun, Turkey. The term subtype might be preferable to the word variety in such cases, as different variety names normally denote differences in the inherent genetic characteristics.

The words ova, yaka, and djebel are sometimes used to mean different types or varieties, but these terms relate only to elevation or topography of the producing area and should not be used to denote a specific or separate type or variety. These words should properly be used to connote the differences in quality of a particular type or subtype of a larger type grouping--such as Basma-djebel, Basma-yaka, or Basma-ova--which result from the leaf being grown in these areas.

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